



**PM**  
**DIRECT**™

# PMDirect User Manual

Version 2.0  
SchoolDude.com, Inc.

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# Welcome and Thank You for Choosing PMDirect!

PMDirect is SchoolDude's answer to managing your facility's recurring preventive maintenance tasks as efficiently as possible! An easy-to-use web-native tool, PMDirect handles everything from tracking all scheduled maintenance to creating recurring maintenance schedules on a daily, weekly, monthly, or annual basis, to storing schedule templates for quick creation of schedules you use frequently. PMDirect can even send automatic email notifications when PM work orders are generated!

In this manual, we've provided you with everything you'll need to know to use PMDirect to your facility's fullest advantage. We'll walk you through everything from the account setup process to how to create and activate schedules for all of your locations, to how to run reports.

To make the instructions in this manual as easy to follow along as possible, you will see page names and important words written in **bold** font, while actions you should take (links to click) at any given point, as well as chapter headings, will be shown in **red** so they'll be hard to miss. Keep an eye out for "**SCHOOLDUDE SAYS**" tips and notes, included to help you out along the way.

For your convenience, this manual includes a brief overview of the Administrator's role at the beginning, as well as a glossary of terms and symbols near the end for easy reference. Please take a moment to look over the glossary before getting started to familiarize yourself with these terms and symbols as you'll see them throughout your use of PMDirect. We've also included a Help Reference page at the end of this manual to guide you to any assistance you might need via telephone, email, or live online chat, should you still have any questions.

Your success and the success of your facility are our number one priority here at SchoolDude and it's something we get really excited about. We want you to get excited too! Should you ever have any questions or concerns, we are never more than a call or a click away. No question is too big or too small for us. We're here for you!

## PMDirect Roles: Who's Who in PMDirect.

There is only one role within PMDirect and that is:

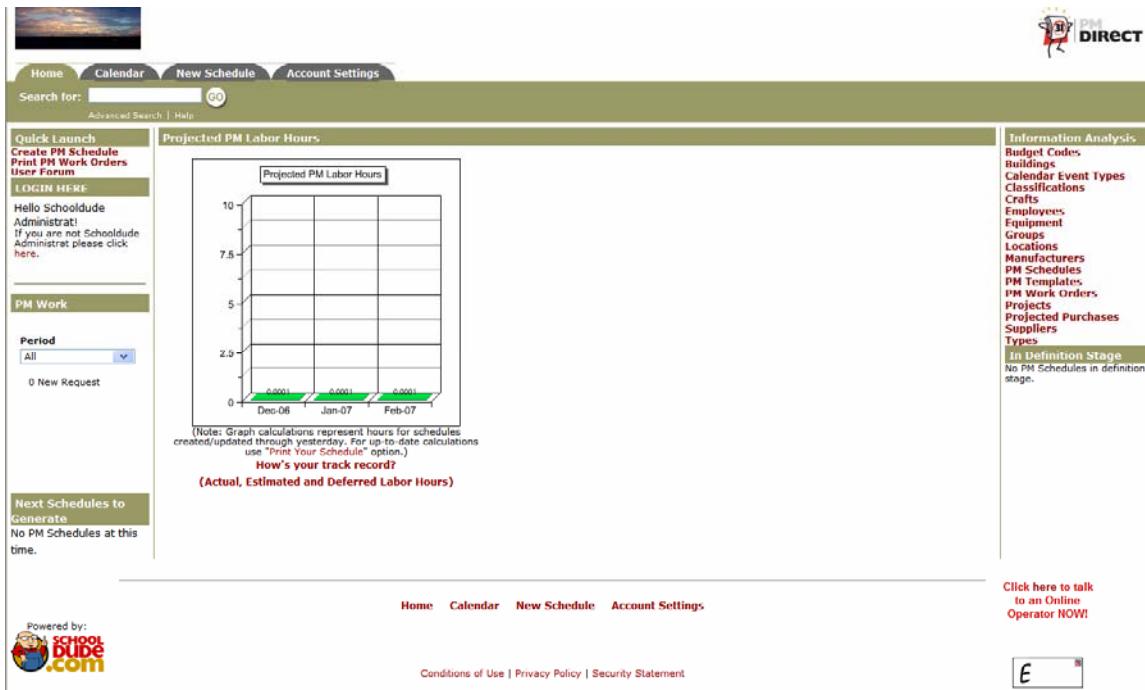
The Administrator: This is the only person (or persons) to have access to the entire system, including the Account Setup, in PMDirect. They can see everything that is going on and can run reports in PMDirect and MaintenanceDirect.

It's important to point out that the actual creation and performance of work orders is carried out in MaintenanceDirect so only those involved in designing schedules have access to PMDirect. An employee's role in MaintenanceDirect is what dictates how the work is actually performed.

# Administrator Guidelines

## I. Welcome to the Home Page! Now What? (A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your **Home** page. It should look something like the example below.



The screenshot shows the PM Direct Home page. At the top, there are four tabs: Home, Calendar, New Schedule, and Account Settings. Below these is a search bar with a 'GO' button and links for Advanced Search and Help. The main content area features a 'Projected PM Labor Hours' graph. The y-axis is labeled 'Projected PM Labor Hours' with increments of 2.5, ranging from 0 to 10. The x-axis shows dates: Dec-06, Jan-07, and Feb-07. Three bars are present, each labeled '0.0001'. Below the graph is a note: '(Note: Graph calculations represent hours for schedules created/updated through yesterday. For up-to-date calculations use "Print Your Schedule" option.)' and a link '(Actual, Estimated and Deferred Labor Hours)'. To the left of the graph is a 'Quick Launch' sidebar with links to Create PM Schedule, Print PM Work Orders, and User Forum. It also includes a 'LOGIN HERE' section with a message for SchoolDude Administrators. Below this is a 'PM Work' section with a 'Period' dropdown set to 'All' and a message '0 New Request'. To the right of the graph is an 'Information Analysis' sidebar with links to various PM Direct features like Budget Codes, Calendars, and Event Types. At the bottom of the page are links for Home, Calendar, New Schedule, and Account Settings, along with a 'Powered by: SCHOOLDULE.com' logo, a 'Click here to talk to an Online Operator NOW!' button, and a small 'E' icon in a box.

Across the top of the page, there are four tabs reading: "Home", "Calendar", "New Schedule", and "Account Settings". Each of these tabs will be discussed in detail further on but for now, let's take a look at the **Home** page. It contains the following:

1. **Quick Launch**: This section provides commonly used links including Create PM Schedule, Print PM Work Orders, and User Forum (a place to submit questions and/or problems you encounter while using PMDirect. You can also read questions others have posted.).
2. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word "**here**" to log in correctly.

3. **PM Work**: Provides links to create a new schedule, print PM work orders (either batch or individual printing), and the SchoolDude.com PMDirect User Forum. This section also supplies the date that PM work orders were generated and the next date that PM work orders are planned to generate.

### Next Schedules to

4. **Generate**: This section of the Home page provides information about the next five days of schedules that will be generated. There is a link to change the view to the next ten days of schedules, if you wish.
5. **Projected PM Labor Hours**: The graph in this section shows the next three months of projected PM labor hours. This information comes from the “estimated hours” field on the New Schedule form, which we’ll cover in detail later. These hours are only a projected estimate, not a view of the actual hours. For actual hours, please view reports in MaintenanceDirect.



**SCHOOLDUDE SAYS:** Macromedia Flash Player (a free download) is required to view the pie graph on the Home page, as well as other graphs throughout PMDirect.

6. **Information Analysis**: This is your go-to section for “getting it done”. It provides important links for all the major components of PM schedule management: Budget Codes, Buildings, Calendar Event Types, Classifications, Crafts, Employees, Equipment, Groups, Locations, Manufacturers, PM Schedules, PM Templates, PM Work Orders, Projects, Projected Purchases, Suppliers, and Types.
7. **In Definition Stage**: These are the PM schedules that have been started but not completed. They are not active and will not generate work orders. If you start a PM schedule and do not get a chance to finish it, it will be listed here. They can be either edited or deleted from the “In Definition Stage” list.

8. **Help** : Help links are available in both the top and bottom right-hand corners of your Home page. Clicking on the **Help** link in the top right-hand corner will take you to the PMDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:

**Click here to talk to  
an Online Operator  
NOW!**

To write and send an email directly to SchoolDude support, simply click on the **Email** icon directly below the link we just mentioned. The Email link looks like this:



A blank email form will pop up, already addressed and ready to use, using whatever email program is set to be used by your Internet browser. If nothing is set, you will be asked to install Microsoft Outlook.

9. The **Quick Links** provide you with a really easy way to navigate quickly between SchoolDude products while you work. For instance, if you would like to move from PMDirect to MaintenanceDirect for whatever reason, all you have to do is click on the **Quick Links** drop-down box, choose the MaintenanceDirect from the list provided there, and you'll be taken to the same page in MaintenanceDirect automatically. Quick Links is located at the top of every page, near the right-hand corner, and looks like this:



## II. **Account Settings**: Tell Us All About Yourself!

The first thing you will need to do as Administrator upon logging in for the first time is to set up all of your account information so that all options and fields will be filled in and available.

Below are the steps that you'll need to follow in the order that will assure that the information you need is there when you need it. Keep in mind that fields marked with a , both in the system and in this manual, are required fields and we will cover those first.



**SCHOOLDUDE SAYS:** Before you get started, just a note to you about the “Manage Codes” section of your Account Settings. All of the codes used throughout PMDirect are nothing more than available information fields for maintenance schedules to make them as clear and useful to your facility as possible. Simply put, Manage Codes is just a way to specify whatever information you would like to include on your maintenance schedules.

**I. Getting Started:** Click on the **Account Settings** tab at the top of the **Home** page. The **Account Settings** page should look like this:

**Account Settings Shortcuts**

<input checked="" type="checkbox"/> Account Setup Steps	<input type="checkbox"/> Account Info	<input type="checkbox"/> Logo Setup	<input type="checkbox"/> Generate PM's On	<input type="checkbox"/> Role Setup
<input type="checkbox"/> ID Manage Codes	<input type="checkbox"/> User Login Log	<input type="checkbox"/> PM Users	<input type="checkbox"/> Copy Schema	
<input type="checkbox"/> ID About Combo				

**Your PM Direct Account Settings**

To begin your journey in PM Direct, you should enter your organization's information in the forms below beginning with Account Information. This is a one-time setup but you may come back to make modifications as often as needed.

Please note to begin using PM Direct you must define your Account Information, define when to "Generate PM's," and define your Groups, Classifications, and Types. If you adopted a schema standard such as Unifromat or CSI then your Groups, Classifications and Types are already defined. You may add the other information such as budget codes at any time.

**Account Settings**  
Setting your account for PM Direct.

**Generate PM's On**  
Set PM generation frequency.

**Manage Codes**  
Add and update all of your system codes such as budget, project, location, and much more.

**Budget**  
**Buildings**  
**Calendar Event Types**  
**Crafts**  
**Employees**  
**Equipment**  
**Locations**  
**Manufacturers**  
**PM Schedules**  
**PM Templates**  
**Project**  
**Projected Purchases Requirements**  
**Suppliers**

1. Groups  
2. Classifications  
3. Types

**Role Setup**

**User Login Log**  
All PM Direct users login information.

**PM Users**  
Identify all PM Direct users and define their roles.

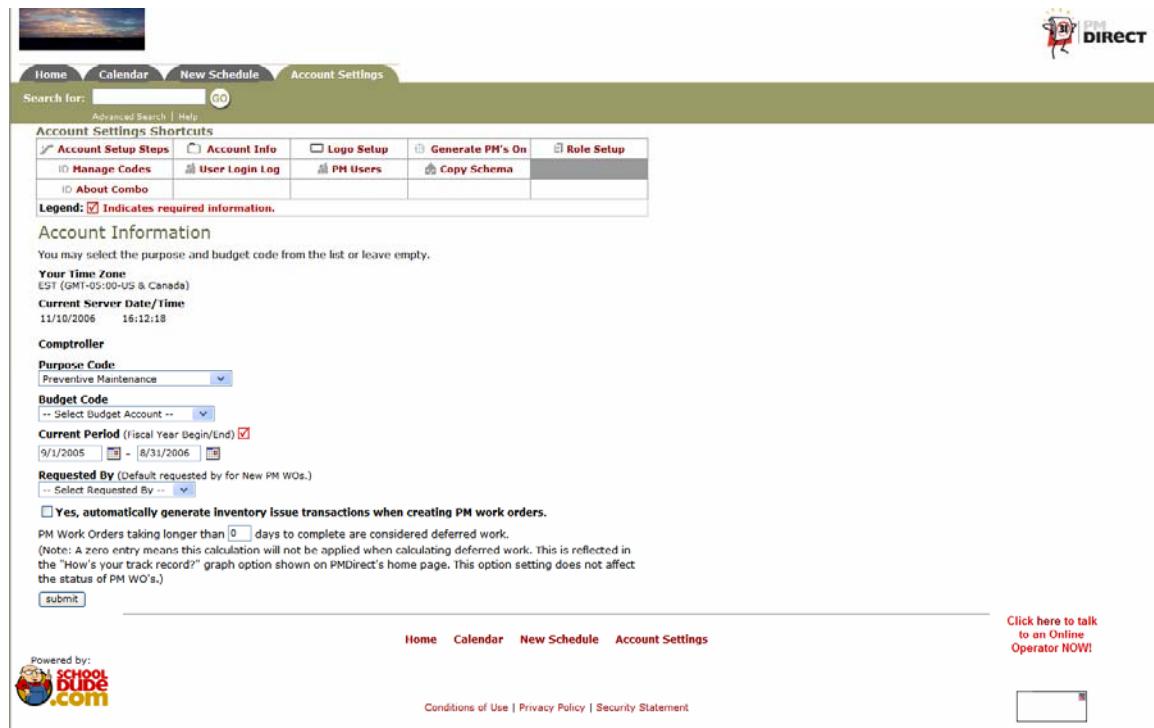
**Home** **Calendar** **New Schedule** **Account Settings**

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Click here to an Operat

2.  **Account Information:** Click on the [Account Settings](#) link and on the Account Information page (shown below), create your setting preferences.



The screenshot shows the MaintenanceDirect Account Settings page. At the top, there are tabs for Home, Calendar, New Schedule, and Account Settings. A search bar is present. The main content area is titled 'Account Settings Shortcuts' and includes links for Account Setup Steps, Account Info, Logo Setup, Generate PM's On, Role Setup, Manage Codes, User Login Log, PM Users, and Copy Schema. A legend indicates that a red checkmark icon next to a link means it is required. Below this is the 'Account Information' section, which allows selecting purpose and budget codes. It includes fields for 'Your Time Zone' (EST), 'Current Server Date/Time' (11/10/2006 16:12:18), 'Comptroller' (Preventive Maintenance), 'Purpose Code' (Preventive Maintenance), 'Budget Code' (Select Budget Account), 'Current Period' (9/1/2005 - 8/31/2006), 'Requested By' (Select Requested By), and a checkbox for 'Yes, automatically generate inventory issue transactions when creating PM work orders.' A note about deferred work is also present. At the bottom, there are links for Home, Calendar, New Schedule, Account Settings, and a 'submit' button. The page is powered by SchoolDude.com.

- Notice that your **Time Zone**, and **Current Server Date/Time** are already set.
- Select your **Purpose Code**. Unless you change purpose code names in MaintenanceDirect, it's a good idea to set this to "Preventive Maintenance". You should also make sure that the Preventive Maintenance purpose code in MaintenanceDirect is set to "Preventive Maintenance".
- Select your **Budget Code**. Only set this if all PM work expenses will come from a single budget.



**SCHOLDUDE SAYS:** Purpose and Budget codes carry over from MaintenanceDirect if any have been entered there previously. You'll learn how to add new Budget codes a little further on in this manual.

- Select the **Current Period (Fiscal Year Begin/End) Dates**.
- **Requested By:** This will be the default "requested by" name for new PM work orders.

- Click the **check box** next to the word “Yes” if you would like to have inventory issue transactions generate automatically when creating PM work orders.



**SCHOOLDUDE SAYS:** This only applies if you also own InventoryDirect. If you do own InventoryDirect and you leave this option blank, it will only submit an inventory request, not an issue.

- In the box provided in the paragraph near the bottom of the page, insert the **number of days** after which you'd like for work orders to be considered as “deferred”. This doesn't automatically change the status of the work, as it only applies to the chart on the PMDirect Home page.
- Click the **Submit** button.

**3. PMDirect Users:** In this section, you can add any users you need to include as Administrators in PMDirect. There are no other roles in PMDirect, but your users names will carry over from MaintenanceDirect to make adding them that much easier for you!

- To get started, click on the **PM Users** link at the bottom of the Account Settings page. You'll be taken to the following page:

- Next, click the **Add User** link at either the top right or bottom left corner of the List of PMDirect Users section.
- Once you click this link, you'll be taken to the following page:

- Once you're on this page, you'll see the “**Registered Users**” drop-down box. Clicking on this **box** will drop down a list of all the users previously entered into MaintenanceDirect. All you have to do to carry them over to PMDirect is the following:
- Select their **name** in the drop-down list.
- Click the **Add This User** button.
- You'll be taken to the PMD Participant Information page, which looks like this:

**PMD Participant Information**

Legend:  Indicates required information.  
 Account Administrator

**Participants Shortcuts**

[Back to Administrative Functions](#) [New](#) [User List](#) [Contact Info](#) [PM Direct Role](#) [Subscription Notifications](#)

**Required Fields**

**Login Name:** AdDude

**First Name:** Alfred

**Last Name:** Dude

**Email:** adude@geewiz.com

(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

**Personnel Type:** Not Assigned

**Phone Number:** 919-555-5555

**Fax:**

**Pager:**

**Pager Email:**  Notify electronically by Pager?  
(Note: Pager notifications for work requester is not supported. User must support electronic notifications. You can test [here](#). Only first 160 characters will be sent.)

**Cellular Phone:**

**Cellular Email:**  Notify electronically by Cellular Phone?  
(Note: Cellular notifications for work requester is not supported. User must support electronic notifications. You can test [here](#). Only first 160 characters will be sent.)

**Disable Login:**  Effective on   
(Note: Disabled users cannot login or receive email notifications, but reporting functions for the disabled users will still be available.)

[Back to Participant List](#) [Next Step](#)

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[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

[Click here to talk to an Online Operator NOW!](#)

[Email](#)

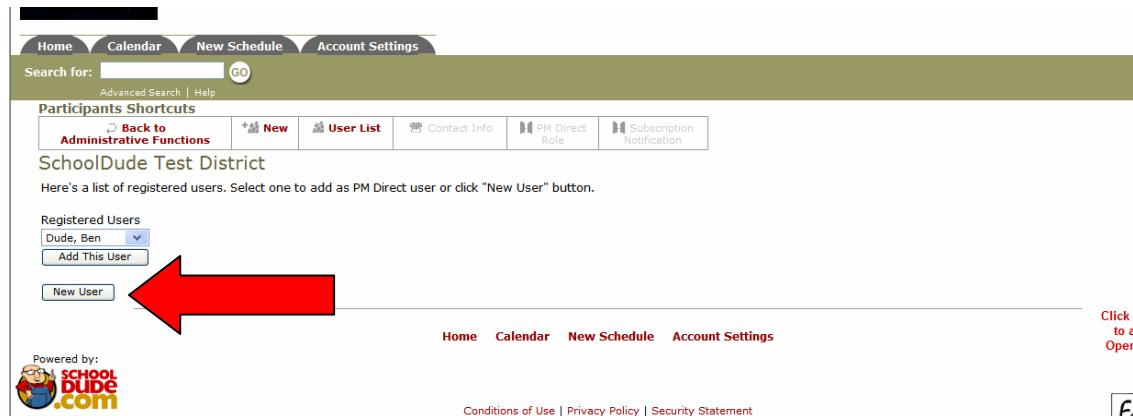
- Check the name and contact information of the User, making any necessary or desired changes. Note that you can also disable a User's login from this page.
- Click the **Next Step** button when you're finished or click **Back to Participant List** to return to the previous page without making any changes.

- On the next page, decide whether or not you want to mark this person as a PMDirect Administrator or if you want to mark them as “Not a PMDirect User” by clicking the appropriate **circle**.
- If you want the user to be notified of their new login information via email, click the **check-box** provided for this option. You can also indicate here whether or not you want a copy of the login email to be sent to you and/or to any other administrators in PMDirect.
- Click **Next Step** when you’re finished or **Back** to return to the previous page.

You’re finished! After clicking Next Step, you’ll be taken back to the List of PMDirect Users page, where you’ll see that your new user has been added.

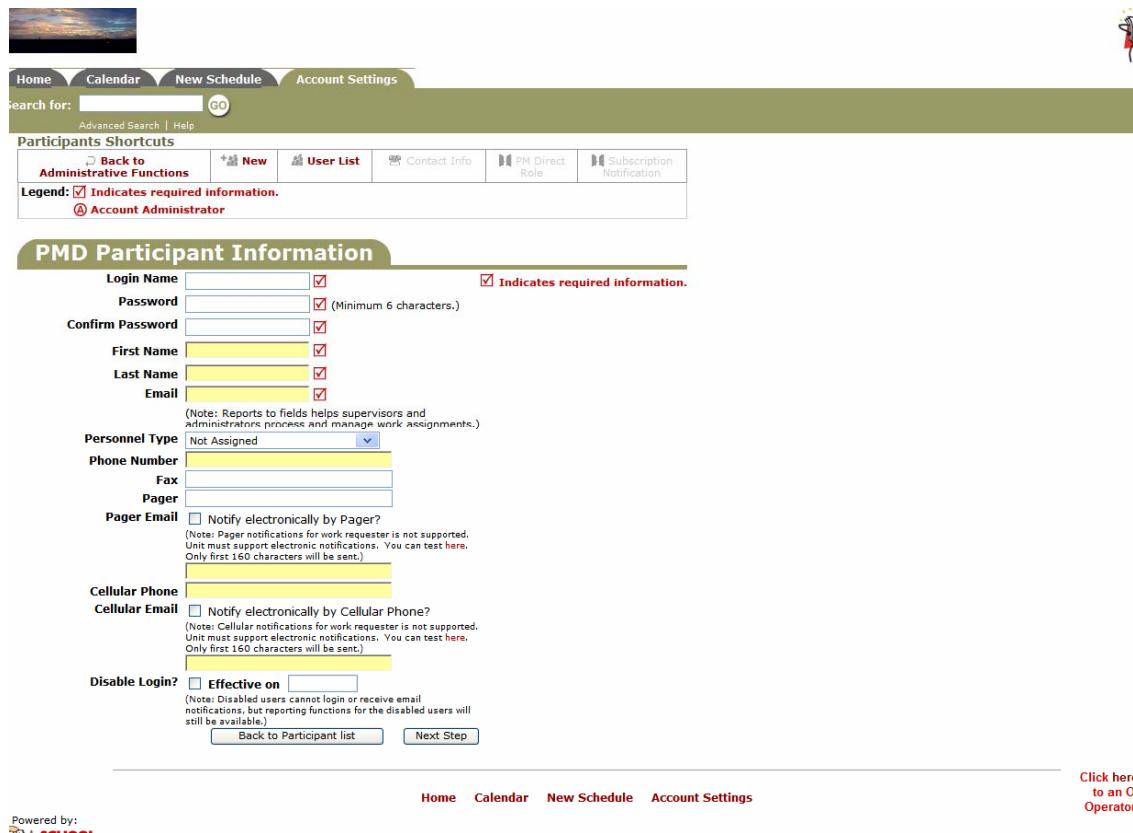
## Adding New PMDirect Users:

- On the List of PMDirect Users page, click the **Add User** link in the top left or bottom right corners.
- On the next page, shown below, click the **New User** button.



The screenshot shows the PMDirect User List page. At the top, there are navigation links: Home, Calendar, New Schedule, and Account Settings. Below these are search fields for 'Search for:' and 'Advanced Search | Help'. A 'GO' button is also present. A 'Participants Shortcuts' bar includes links for 'Back to Administrative Functions', 'New', 'User List', 'Contact Info', 'PM Direct Role', and 'Subscription Notification'. The main content area is titled 'SchoolDude Test District' and displays a list of registered users. A dropdown menu shows 'Registered Users' and 'Dude, Ben'. Below this is a 'New User' button. A red arrow points to the 'New User' button. At the bottom, there are links for 'Home', 'Calendar', 'New Schedule', 'Account Settings', 'Conditions of Use', 'Privacy Policy', and 'Security Statement'. A 'Powered by: SCHOOLDUDE.COM' logo is at the bottom left, and a 'Click here to a Operator' link is at the bottom right.

- You'll be taken to the PMD Participant Information page, shown below:



The screenshot shows the PMD Participant Information page. At the top, there are navigation links: Home, Calendar, New Schedule, and Account Settings. Below these are search fields for 'Search for:' and 'Advanced Search | Help'. A 'GO' button is also present. A 'Participants Shortcuts' bar includes links for 'Back to Administrative Functions', 'New', 'User List', 'Contact Info', 'PM Direct Role', and 'Subscription Notification'. A legend indicates that a red checkmark indicates required information. The main content area is titled 'PMD Participant Information'. It contains fields for Login Name, Password, Confirm Password, First Name, Last Name, Email, Personnel Type, Phone Number, Fax, Pager, Pager Email, Cellular Phone, Cellular Email, and Disable Login. Each field has a red checkmark indicating it is required. A note for the Pager Email field states: '(Note: Pager notifications for work requester is not supported. Unit must support electronic notifications. You can test here. Only first 160 characters will be sent.)'. A note for the Cellular Email field states: '(Note: Cellular notifications for work requester is not supported. Unit must support electronic notifications. You can test here. Only first 160 characters will be sent.)'. A note for the Disable Login field states: '(Note: Disabled users cannot login or receive email notifications, but reporting functions for the disabled users will still be available.)'. At the bottom, there are 'Back to Participant list' and 'Next Step' buttons. A 'Click here to an Operator' link is at the bottom right. A 'Powered by: SCHOOLDUDE.COM' logo is at the bottom left.

- Fill in the required fields (marked with a ), including **Login Name**, **Password**, **Name**, and **Email**, along with any other information you'd like to include.
- Click the **Next Step** button at the bottom of the page when you're finished.
- Follow the same directions as those for adding an existing user, starting on page 9.

**4. Generate PM's On:** In this section you'll set up how often you want the SchoolDude.com servers to generate your work orders. This doesn't set up the frequency of schedules, however. Each night at midnight, our server will generate the work orders as you specify here.

You can reach the page you need by clicking the **Generate PM's On** link on the **Account Settings** page.

Account Settings Shortcuts					
<a href="#">Account Setup Steps</a>	<a href="#">Account Info</a>	<a href="#">Logo Setup</a>	<a href="#">Generate PM's On</a>	<a href="#">Role Setup</a>	
<a href="#">Manage Codes</a>	<a href="#">User Login Log</a>	<a href="#">PM Users</a>	<a href="#">Copy Schema</a>		
<a href="#">About Combo</a>					

When should preventive maintenance work be generated?

Note: PM work orders are generated each night. The results can be emailed directly to you (see below).

Begin auto generation date

Please specify the first date PM WO generation should start, once you have this date specify you cannot change it in the future.

Generate PM Work Orders every  days and  days ahead of their due date.

Yes, create new PM WO even when there is a work order in-process, not completed/closed.

Note: Creating future PM WO's will require PM WO's to be generated with non-complete/closed PM WO's. Check "Yes, create new PM WO even when outstanding work order has not been completed/closed." if you want to create multiple future PM WO's for the same schedule.

Yes, send a notification when PM WO's are created to this email address  [schooldudeadmin@schooldude.co](mailto:schooldudeadmin@schooldude.co)

[Home](#) [Services](#) [More Information](#) [Demo](#)

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- First of all, you'll need to specify the **date** on which you'd like for PM work order generation to start. **Keep in mind that once you set this date, you can't change it.**
- Next, decide how often you want PM work orders to be generated by filling in the following blanks: "Every  days and  days ahead of their due date. This lets you determine the frequency that PM work orders will be generated, as well as giving you however much time you'll need to see them before their due date.



**SCHOOLDUDE SAYS:** If you're printing out work orders for your staff, you may want to enter 30, 30 so that one big batch will come out that you can easily print each month. If your staff logs into MaintenanceDirect to perform their work, you may want to enter 1, 14 so that it checks every evening and gives the staff two weeks of lead time (they'll trickle in instead of batching in at once).

- After that, you'll need to decide whether or not you'd like for a new PM work order to be created, whether or not there is a work order in-process and not completed/closed. Indicate your decision by using the **check-box** provided.



**SCHOOLDUDE SAYS:** You'll need to also keep in mind for this step that creating future PM work orders will require work orders to be generated with non-complete/closed PM work orders. Check the box discussed above if you'd like to create multiple future PM work orders for the same schedule.

- Next, decide whether or not you'd like an email notification to be sent when PM work orders are created, and to whom. Click the **check-box** provided and then enter the desired **email address** in the box. You can enter multiple email addresses by separating them with commas.

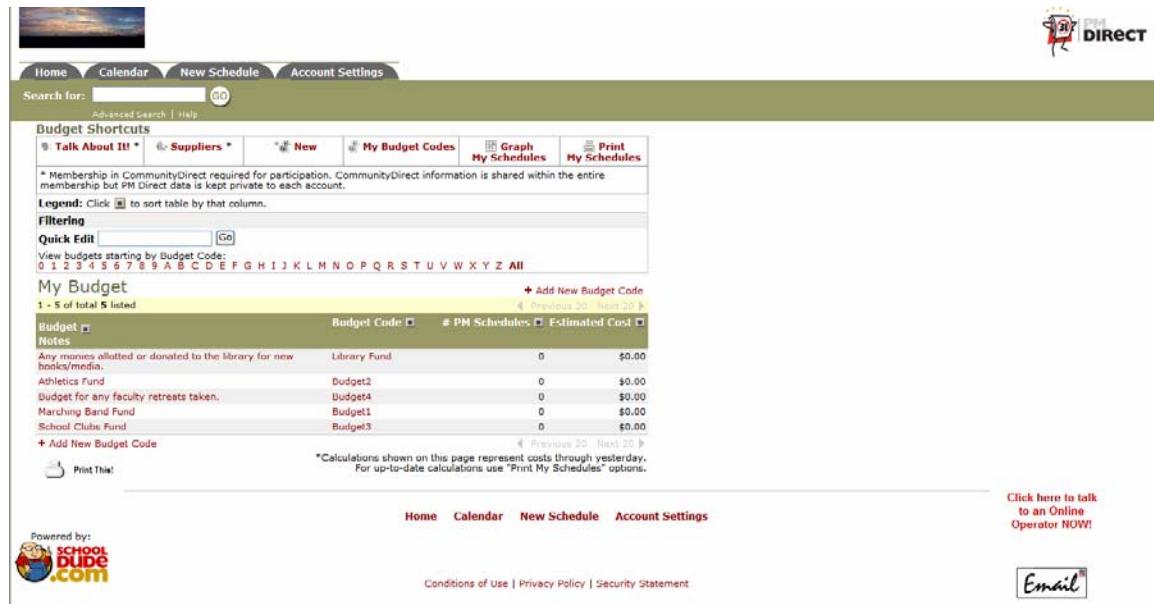


**SCHOOLDUDE SAYS:** Something else you'll need to keep in mind here: If you set it up so that you'll receive an email notification when PM work orders are created, you'll get an email with EVERY PM work order that's generated. Depending on how much PM work that goes on at your facility, your inbox can fill up pretty fast!

- Click **Submit** when you're finished. Your changes have been saved!

**5. Budgets:** If you would like to keep track of budgeting and project-related costs (optional), enter your budget information here. A Budget option will show up in the next step of your Account Setup process (Locations), so in order to have it available then, it should be set up now. You can have a different budget for each location or for each project or schedule. Organize your budgets in the way that works best for you.

To get started, click the **Budget** link on the **Account Settings** page. You'll be taken to the **My Budget** page, which looks something like this:



**Budget Shortcuts**

- [Talk About It!](#)
- [Suppliers](#)
- [New](#)
- [My Budget Codes](#)
- [Graph](#)
- [My Schedules](#)
- [Print](#)

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

**Legend:** Click  to sort table by that column.

**Filtering**

**Quick Edit**

View budgets starting by Budget Code:  
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

**My Budget**

1 - 5 of total 5 listed

Budget	Budget Code	# PM Schedules	Estimated Cost
Notes			
Any monies allotted or donated to the library for new books/media.	Library Fund	0	\$0.00
Athletics Fund	Budget2	0	\$0.00
Budget for any faculty retreats taken.	Budget4	0	\$0.00
Marching Band Fund	Budget1	0	\$0.00
School Clubs Fund	Budget3	0	\$0.00

[+ Add New Budget Code](#)

\*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print My Schedules" options.

[Print This!](#)

**Home** **Calendar** **New Schedule** **Account Settings**

Powered by:  Click here to talk to an Online Operator NOW! 

[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

As you can see from the example above, if any budgets have been entered previously in MaintenanceDirect, they'll show up here in PMDirect, listed to show their Notes, Code (name), any PM Schedules attached, and the Estimated Cost.

To see any particular budget code on the list, click on its **name**, shown in red in the list.

To add a new budget code, do the following:

- Click on the **Add New Budget Code** link in the top right and bottom left corners of the My Budget list. See below:



You'll then be taken to the Add/Update Budget Code page, which looks like this:

A screenshot of the 'Add/Update Budget Code' page. The page has a green header with links for Home, Calendar, New Schedule, and Account Settings. Below the header is a search bar and a legend indicating that red text is required information. The main form has fields for 'Budget Code' (with a checked checkbox), 'Description' (with a checked checkbox), 'Fiscal Year Budget Monies' (set to \$0.00), and 'Notes' (a text area). At the bottom are 'Submit' and 'Cancel' buttons, along with links to 'Add New Budget Code' and 'Go Back to Budget Code List'. The page footer includes links for Home, Calendar, New Schedule, Account Settings, and a link to 'Click here to talk to an Online Operator NOW!'.

- On this page, enter the **name** of your budget in the Budget Code box provided.
- In the “Description” field, give the budget a self-explanatory name or give a brief **description** of what the budget is for.
- Enter any **Fiscal Year Budget Monies** and any **notes** you wish to include.
- Click **Submit**.



**SCHOOLDUDE SAYS:** Keep in mind that the Budget window will display the budget's code and description. You will have room for about 30 characters.

When the page refreshes, you will be taken back to the My Budget page where you will see the new budget has been added at the bottom of the list. Initially, it will show with a yellow thumbs-up () next to it, which indicates that the budget is currently active. To deactivate the budget (and to reactivate it at any time), simply click on the thumb. This will change it to a grey thumbs-down (, which indicates that the budget is inactive.



**SCHOOLDUDE SAYS:** To delete or update a Budget at any time, click on the **Budget name** on the My Budget page. Once on the Add/Update Budget page, you can either edit the budget information, clicking **Submit** when you're finished, or you can scroll down to the bottom and click **Delete Record** to take the budget off of your list.



**SCHOOLDUDE SAYS:** Budgets with costs attached can NOT be deleted unless costs are reassigned.  
Also, changes in \$ amount update each night at midnight.

**6.  Locations:** Locations are typically campuses in a school district and will carry over from those entered in MaintenanceDirect. If you manage a single campus, you may want to use locations for different places on that campus. (Examples: Dude High School, West Campus).

You can reach the Locations page by clicking on the **Locations** link on the Account Settings page. It should look something like this:

**Location Shortcuts**

- [Talk About It!](#) \*  [Suppliers](#) \*  [New](#)  [My Locations](#)  [Graph My Schedules](#)  [Print My Schedules](#)

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

**Legend:** Click  to sort table by that column.

- Use Location in PMDirect
- Hide Location in PMDirect

Estimated Fiscal Yr PM Costs for total of 0 Schedules assigned "All Locations": \$0.00

**Filtering**  
View locations starting by:  
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

**My Locations**

Location	# Students	Sq.Ft	Date Built	Facility Age	Fiscal Yr PM
# Active PM Schedules	PM Cost/Student	PM Cost/SqFt			
Sloan Community College	9850	50000	1/22/1987	19 years	\$0.00
Sloan Elementary School	1500	25000	3/28/1950	55 years	\$0.00
Sloan High School	2500	22000	3/28/1980	26 years	\$0.00
Sloan Middle School	1000	20000	3/28/1985	21 years	\$0.00
South Sloan High School	1300	0			\$0.00
West Sloan High School	2500				\$0.00

[+ Add New Location](#)

[Print This!](#)

\*Calculations shown on this page represent costs/counts through yesterday. For up-to-date calculations use "Print My Schedules" options.

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

[Click here to I to an Online Operator NO!](#)

[Powered by:](#)

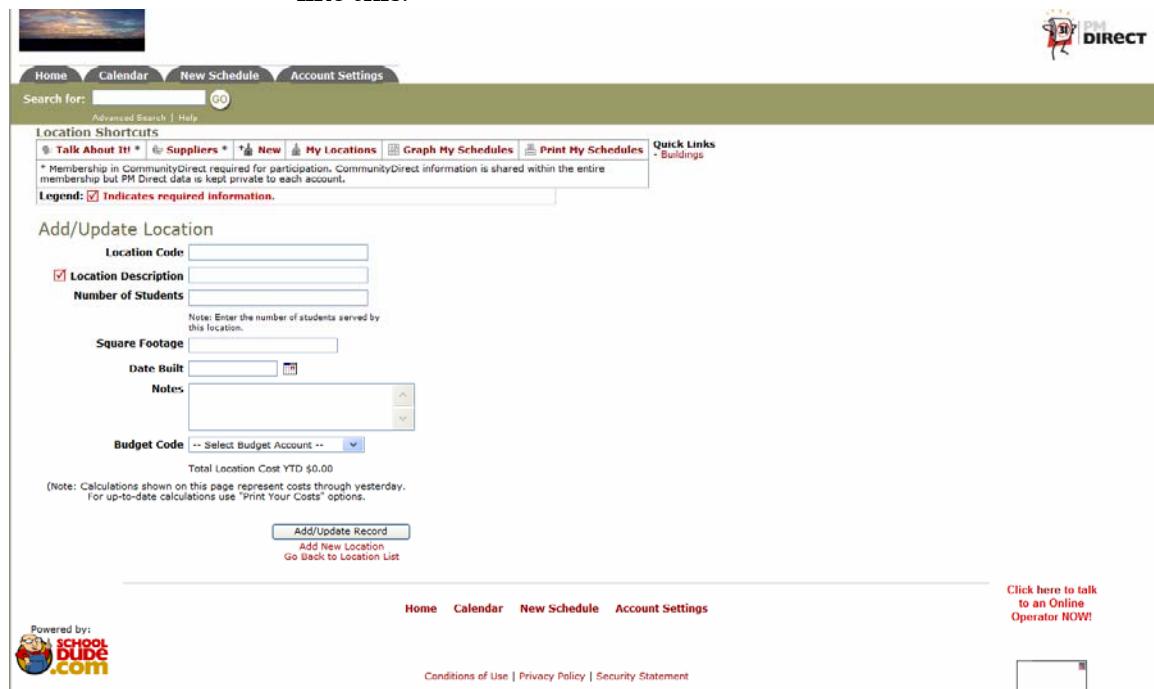
[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

[Email](#)

What you'll need to do on this page is to **activate** the Locations for which you'll be creating PM schedules. To activate a Location, click on the **grey thumbs-down** () icon next to that Location's name. When the page refreshes, the icon will be changed to a **yellow thumbs-up** () to indicate that the Location is now active.

To add a new location, follow these steps:

- Click the **Add New Location** link on the **My Locations** page.
- You'll be taken to the **Add/Update Location** page, which looks like this:



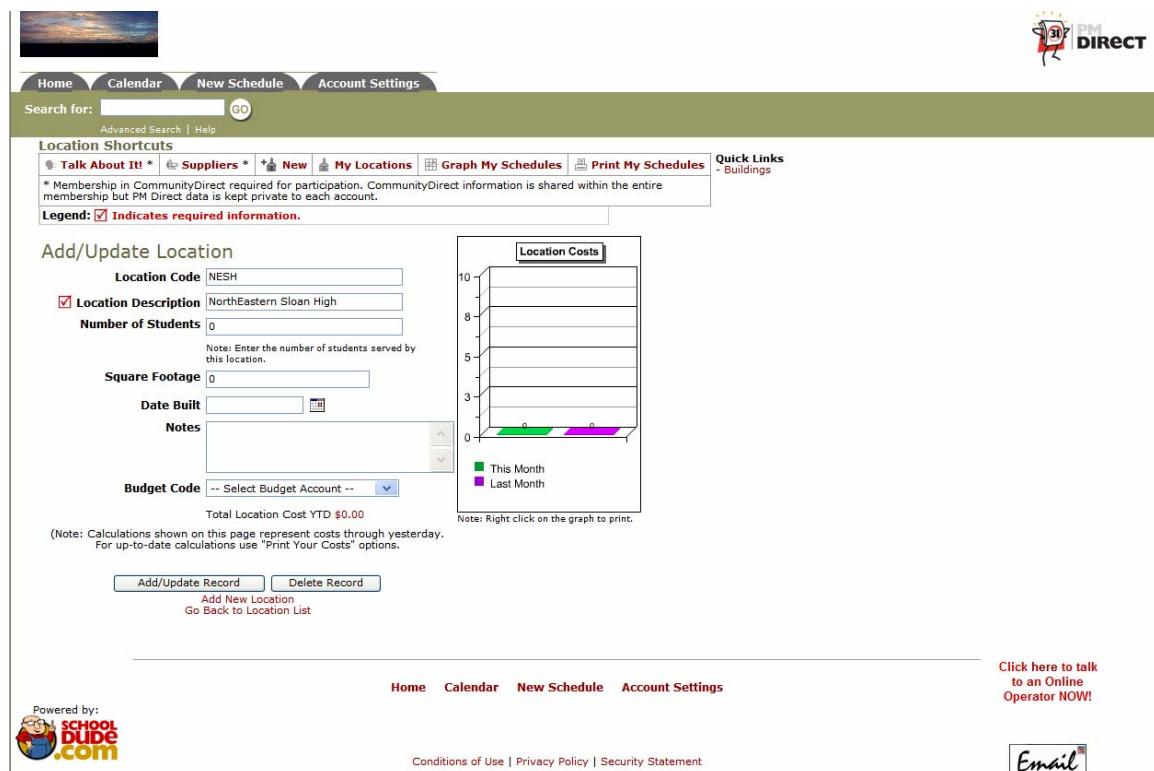
The screenshot shows the 'Add/Update Location' form. At the top, there are navigation links: Home, Calendar, New Schedule, Account Settings, and a search bar with a 'GO' button. Below the search bar is a 'Location Shortcuts' menu with links to 'Talk About It!', 'Suppliers', 'New', 'My Locations', 'Graph My Schedules', 'Print My Schedules', and 'Quick Links' (Buildings). A legend indicates that a red checkmark in a box means 'Indicates required information'. The main form fields include:

- Location Code:** A text input field.
- Location Description:** A text input field with a red checkmark indicating it is required. A note below says: 'Note: Enter the name of the location.'
- Number of Students:** A text input field with a note: 'Note: Enter the number of students served by this location.'
- Square Footage:** A text input field.
- Date Built:** A date input field.
- Notes:** A text area with scroll bars.
- Budget Code:** A dropdown menu with the placeholder 'Select Budget Account'.

A note at the bottom left says: 'Total Location Cost YTD \$0.00' and 'For up-to-date calculations use "Print Your Costs" options.' At the bottom are buttons for 'Add/Update Record', 'Add New Location', and 'Go Back to Location List'. The footer includes links for Home, Calendar, New Schedule, Account Settings, and a 'Powered by: SCHOOLDUDE.COM' logo. A 'Click here to talk to an Online Operator NOW!' button is also present.

- On the **Add/Update Location** page, assign a **code** to your location and enter it in the **Location Code** field. (An example of a Location Code would be "THS" for "Triton High School").
- In **Location Description**, enter the **name** of the location.
- Enter any further information you have, including **number of students** at each location, **square footage**, any **notes** you wish to make, and **budget code**. Then click **Add/Update Record**.

You will be taken to the following page:



PM DIRECT

Location Shortcuts

Talk About It! \* Suppliers \* New My Locations Graph My Schedules Print My Schedules Quick Links Buildings

Legend:  Indicates required information.

Add/Update Location

Location Code: NESH

Location Description: NorthEastern Sloan High

Number of Students: 0

Note: Enter the number of students served by this location.

Square Footage: 0

Date Built:

Notes:

Budget Code: -- Select Budget Account --

Total Location Cost YTD: \$0.00

(Note: Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print Your Costs" options.)

Add/Update Record Delete Record Add New Location Go Back to Location List

Home Calendar New Schedule Account Settings

Click here to talk to an Online Operator NOW!

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Email

You can make changes to your Budget information on this page now or at any time by clicking on the **name** of the budget on the **My Budget Codes** page. The Location Costs section to the right is a graph that will show costs for this location for This Month in green and Last Month in purple.



**SCHOOLDUDE SAYS:** To delete a Location, click on the **Locations** link from the Account Settings page. Click on the **name** of the location on the My Locations page, scroll to the bottom of the Add/Update Location page, and click **Delete**. Confirm by clicking **OK** in the box that will pop up and you will immediately be taken back to the My Locations page which will show that the location has been deleted.

*You will not be able to delete a location once costs have been assigned to it.*

**7. Buildings:** This section is optional, but if you have multiple free-standing structures on a campus, these could be listed as buildings for a particular location (Examples: Dude Hall, Smith Performing Arts Center, etc.). As with Locations, Buildings will carry over from those entered in MaintenanceDirect so that all you have to do here in PMDirect is to activate those that you will be working with. You can also add Buildings in PMDirect that will carry back over to MaintenanceDirect, but try to avoid using smaller structures like field houses, pump houses, or modular units as Buildings.

The My Buildings page can be reached by clicking on the **Buildings** link on the Account Settings page. It should look something like this:

Name	Location	Sq. Ft.	*Calendar Cost YTD	*Fiscal Cost YTD
C. Boyd Auditorium	Sloan High School		\$0.00	\$0.00
R. Sloan Gymnasium	Sloan High School		\$0.00	\$0.00

**Building Shortcuts**

- [Talk About It!](#) \*
- [Suppliers](#) \*
- [New](#)
- [My Buildings](#)
- [Graph My Schedules](#)
- [Print My Schedules](#)

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

**Legend:** Click to sort table by that column.

- Use Building in PMDIRECT
- Hide Building in PMDIRECT

**Filtering**  
View buildings starting by:  
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

**My Buildings**  
1 - 2 of total 2 listed

[+ Add New Building](#)

[Print This!](#) [Print to Excel](#)

\*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "My Building Reports" options.

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

**Powered by:**

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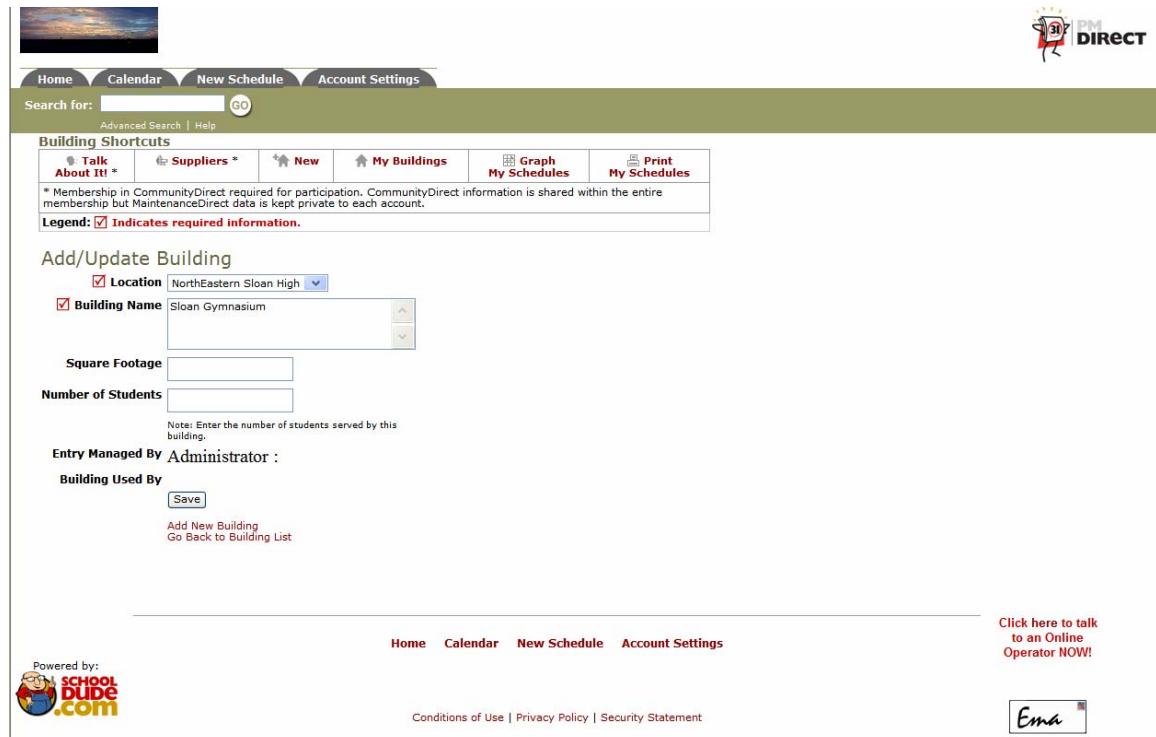
[Click here to talk to an Online Operator NOW!](#)

[Email](#)

On this page, just as you did for Locations, just go down the list of Locations carried over from MaintenanceDirect and activate those Buildings you will be using. Do this by clicking the grey **thumbs-down icon** () next to that Building's name to change it to the yellow thumbs-up () , which indicates that the Building is now active.

Also as in Locations, you have the ability to add a new Building in PMDirect. To do this, click on the **Add New Building** link on the **My Buildings** page.

The page you'll be taken to will look something like this:



- Select the **Location** of the building from the drop-down box provided.
- Enter the **Name** of the building.
- Include **square footage** and **number of students** served, if desired.
- Click **Save** at the bottom of the page.

You will then be taken back to the **My Buildings** page which will show the new building that you just entered (see screen shot on the next page). Continue adding Buildings by clicking the **+Add New Building** link and repeating the steps above.



**SCHOOLDUDE SAYS:** To edit/update information for a particular building, simply click on that building's **name** on the My Buildings page, make the changes that you wish to make on the Add/Update Building page, and click **Save**.



**SCHOOLDUDE SAYS:** To **Delete** a building, simply click on the name of that building on the My Buildings page. Once on the Add/Update Building page, click the **Delete** button near the bottom. The building will then be deleted.



**SCHOOLDUDE SAYS:** You will not be able to delete a building once costs have been assigned to it.

**8. Crafts:** Crafts are generic skills needed to fix a problem. MaintenanceDirect and PMDirect have over 200 crafts to choose from. Crafts help you organize your work and assign it to the appropriate people. Think of crafts as another way of saying “trade code” or “problem type”.

To set up Crafts, simply follow these steps:

- From the Account Settings page, click on the **Crafts** link.

The page you are taken to should look like this:

**Craft Shortcuts**

- [Talk About It!](#) \*
- [Suppliers](#) \*
- [My Crafts](#)
- [Craft List](#)
- [Graph My Schedule](#)
- [Print My Schedule](#)

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

**Legend:** Click to sort table by that column.

- Use Craft in MaintenanceDirect
- Hide Craft in MaintenanceDirect

**Filtering**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z [All](#)

**My Crafts**

1 - 20 of total 251 listed

Craft	# PM Schedules	Estimated Cost
Advertisements	0	\$0.00
Air Conditioning	0	\$0.00
Alarm	0	\$0.00
Appliance Repair	0	\$0.00
Architect	0	\$0.00
Asbestos	0	\$0.00
Asphalt	0	\$0.00
Athletic Fields	0	\$0.00
Audio/Visual	0	\$0.00
Autoclave	0	\$0.00
Backflow	0	\$0.00
Band Instrument Repair	0	\$0.00
Bleachers	0	\$0.00
Boiler	0	\$0.00
Building Engineer	0	\$0.00
Burglar Alarm	0	\$0.00
Bus Seat Repair	0	\$0.00
Cabinet Shop	0	\$0.00
Cabling	0	\$0.00
Cafeteria	0	\$0.00

Previous 20 Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print My Schedule" options.

[Print This!](#)

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

**Click here to talk to an Online Operator NOW!**

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[Email](#)

- Begin activating Crafts by scrolling through the list of Crafts given and clicking on the grey **thumbs-down** (👎) to change it to a yellow thumbs-up (👍), which indicates that the Craft is then active.



**SCHOOLDUDE SAYS:** To speed up this process, click on the **My Crafts** **shortcut** at the top of the page:



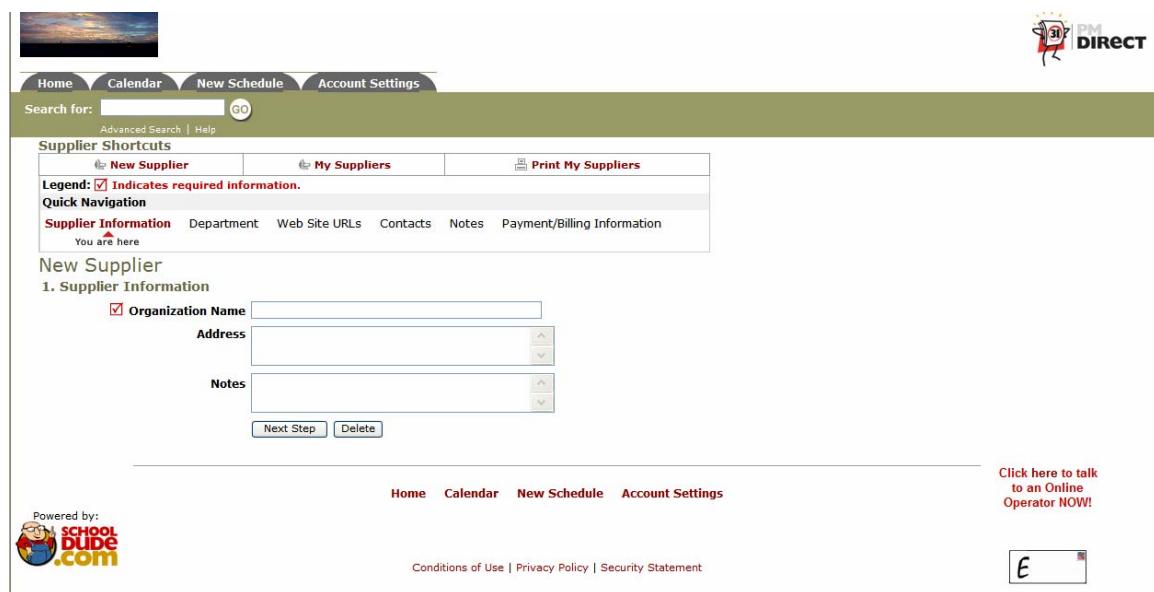
This will take you to a long list of all the Crafts that you can simply scroll down and activate, rather than switching from page to page with every twenty Crafts. You may want to turn on any crafts being used in MaintenanceDirect that you need to perform PM work on.

Try starting out with the smallest number of Crafts activated as possible to limit the confusion of your new users when they fill out a form. You can always activate more crafts later.

**9. Suppliers:** This step in the Account Setup process allows you to keep track of all of the suppliers used by your educational facility when ordering equipment and supplies for various projects. Suppliers entered in MaintenanceDirect will automatically carry over to PMDirect. New suppliers are normally added because there's a regular supplier you use for certain materials or PM schedules and you know that purchases from this supplier will be approved.

To start adding suppliers, follow these steps:

- On the Account Settings page, click on the **Suppliers** link.
- On the My Suppliers page, click the **+Add New Supplier** link.
- You will be taken to the New Supplier page, which will look like this:



The screenshot shows the 'New Supplier' page. At the top, there's a header with a sunset background, a navigation bar with 'Home', 'Calendar', 'New Schedule', and 'Account Settings', and a search bar. Below the header is a 'Supplier Shortcuts' section with links for 'New Supplier', 'My Suppliers', and 'Print My Suppliers'. A legend indicates that a red checkmark icon indicates required information. The main content area is titled 'New Supplier' and '1. Supplier Information'. It contains fields for 'Organization Name' (with a red checkmark icon), 'Address', and 'Notes', each with a text input field and a dropdown arrow. Below these fields are 'Next Step' and 'Delete' buttons. At the bottom of the page are links for 'Home', 'Calendar', 'New Schedule', 'Account Settings', and a 'Powered by SchoolDude.com' logo. A red box highlights the 'Organization Name' field. A red box also highlights the 'Next Step' button. A red box highlights the 'E' in the bottom right corner of the page.

- Enter the **Organization Name** (the name of the supplier) here.
- If you have the Supplier's **address**, enter it here.
- Include any **notes** you wish to include in the field provided.
- Click **Next Step**.

The page you are taken to next will look like this:

- If you would like to create a department name (if specifying a particular department of your supplier is necessary), enter the **name, address, phone, fax**, and/or any **notes** here. If you want, you can choose to skip this step.
- Click **Next Step**.
- If you wish to enter your supplier's web site information, do so here. You may also choose to skip this step if you wish.
- Click **Next Step**.
- Define Contacts: Enter the **first and last name** of your contact at this supplier and provide any other contact information you wish to include (department, phone, fax, cell, email, notes, etc.) To add more than one contact, click **Add** after filling in the first contact's name and information.
- Click **Next Step**.
- Create New Note: Enter any further notes you wish to include on this supplier. You may skip this step, if you wish.

- Click **Next Step**.
- Payment/Billing Information: Enter your supplier's billing information here: **Payment Terms** (add Payment Terms by clicking the [Add/Edit Terms](#) link provided), **Delivery Terms**, **Federal ID#**, **Credit Limit**, **Minimum Order Amount**, **Surcharge**, and whether or not they are active.
- Click **Submit**.
- You will be taken back to the **My Suppliers** page, which will show your newest supplier has been added.



**SCHOOLDUDE SAYS:** To update supplier information, click on that supplier's name in the **My Suppliers** list. Proceed through the steps above, making the desired changes to your supplier's information and click **Submit** when finished.



**SCHOOLDUDE SAYS:** To delete a supplier once it's been added and before any costs are tied to it, simply click on that supplier's name in the **My Supplier** list. In the first "Update Supplier" step, click the **Delete** button at the bottom of the page, beneath the Notes field. A gray confirmation box will appear to make sure that you want to delete the supplier. Click **OK**. You will then be taken back to the **My Suppliers** page, which will show that the supplier has been deleted.



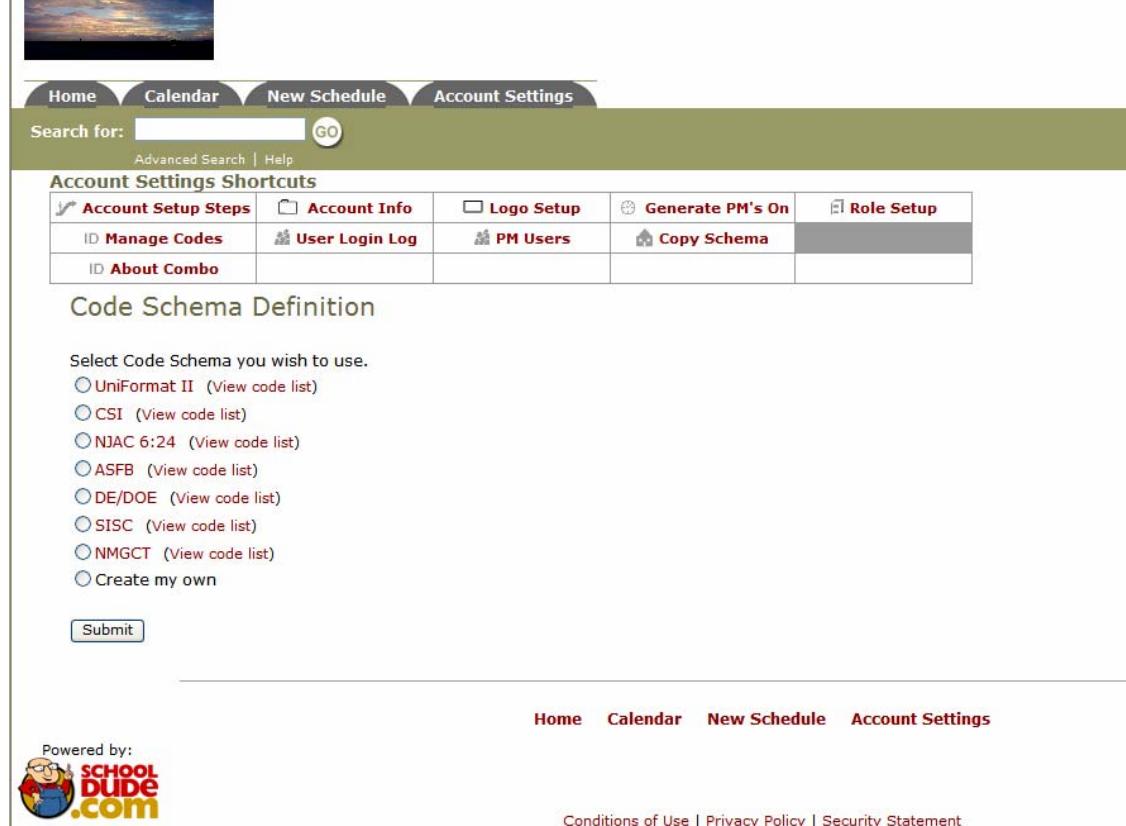
**SCHOOLDUDE SAYS:** Keep in mind that you will NOT be able to delete a supplier once you have costs associated with it.

**10. Copy Schema:** In the three sections following this one, we will cover Groups, Classifications, and Types, but before we get started with those, let's take a look at the Copy Schema page, shown below, as this section can be used to clarify what Groups, Classifications, and Types you choose.



**SCHOOLDUDE SAYS:** Unless you really need to make your own Groups, Classifications, and Types from scratch, SchoolDude recommends using one of the pre-set code Schemas. These can be reached by clicking the “**Copy Schema**” shortcut at the top of the Account Settings page. It looks like this:

 **Copy Schema**  
These pre-set code schemas save a lot of time by pre-populating Groups, Classifications, and Types, and can be modified as needed. You can also look at these code schemas to get an idea of how Groups, Classifications, and Types are typically used.



The screenshot shows the SchoolDude Account Settings page. At the top, there is a navigation bar with links for Home, Calendar, New Schedule, and Account Settings. Below the navigation bar is a search bar with a 'GO' button and links for Advanced Search and Help. A section titled 'Account Settings Shortcuts' contains a grid of links. The 'Copy Schema' link is highlighted with a grey background. Below this, a section titled 'Code Schema Definition' asks to select a code schema. A list of options is provided, with 'Create my own' being the last item. At the bottom of the page, there is a 'Submit' button and a footer with links for Home, Calendar, New Schedule, Account Settings, Powered by SchoolDude.com, and links for Conditions of Use, Privacy Policy, and Security Statement.

 Account Setup Steps	 Account Info	 Logo Setup	 Generate PM's On	 Role Setup
 ID Manage Codes	 User Login Log	 PM Users	 Copy Schema	
 ID About Combo				



**SCHOOLDUDE SAYS:** Once you copy a schema into your account, it will be difficult to undo so please make sure that you want that particular schema.

If you choose to use a pre-defined schema, you can still add, modify, and delete to customize groups, classifications, and types. You will not be limited to the schema that is copied.

- To view an example of each schema, click on the [View Code List](#) link provided in parenthesis next to each Code Schema. DON'T click the empty buttons to the left of each Code Schema—click those only when you wish to select that schema for use.

To copy a schema, click the empty [button](#) to the left of it and then click [Submit](#).

**11. Groups:** Groups, classifications, and types are used to categorize schedules and equipment. Groups are the broadest category of equipment or building systems, moving down to Classifications, and then Types, respectively. An example of a Group would be “Equipment”.

Classifications and Types will be covered in the next two sections but for now, let’s get started entering our Groups.

To reach the My Groups page, click on the **Groups** link on the Account Settings page. Groups carry over from MaintenanceDirect if they are entered there. In the example below, no Groups are shown as having been entered:

The screenshot shows the 'My Groups' page in the CommunityDirect software. At the top, there is a navigation bar with links for Home, Calendar, New Schedule, and Account Settings. Below this is a search bar and a legend for sorting tables. The main content area is titled 'My Groups' and shows a table with the following data:

My Groups		
1 - 0 of total 0 listed	<a href="#">+ Add New Group</a> <a href="#">Print This!</a>	
<input checked="" type="checkbox"/> <b>Group</b> <input type="checkbox"/> <b># PM Schedules</b> <input type="checkbox"/> <b>Estimated Cost</b>		
No Groups in record.		
<small>*Calculations shown on this page represent costs/counts through yesterday. For up-to-date calculations use "Print My Schedule" options.</small>		

At the bottom of the page, there are links for Home, Calendar, New Schedule, and Account Settings. There is also a 'Powered by' link to SchoolDude.com and a 'Click here to talk to an Online Operator NOW!' button with an 'Email' link.

- To get started, click on one of the **Add New Group** links, located in the Shortcuts, on the far right-hand side of the page just above the Group list, or on the far left-hand side of the page just under the Group list.
- This will take you to the Add/Update Group page. On this page, simply enter the **description**, or name, of the Group in the field provided.
- If you would like to have a specific image or icon to represent this group, browse out and find the image you want.
- Click **Submit**.
- You’ll be taken back to the My Groups page where you’ll see that your new Group has been listed. See next page:

PM DIRECT

Group Shortcuts

- [Talk About It!](#) \* [Suppliers\\*](#) [New Group](#)
- [My Groups](#) [Graph My Schedule](#) [Print My Schedule](#)

Quick Links

- Classifications
- Types

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

Legend: Click to sort table by that column.

Filtering

View Group starting by: 0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

My Groups

1 - 1 of total 1 listed

Group	# PM Schedules	Estimated Cost
Equipment	0	\$0.00

[+ Add New Group](#)

[Print This!](#)

\*Calculations shown on this page represent costs/counts through yesterday. For up-to-date calculations use "Print My Schedule" options.

Home   Calendar   New Schedule   Account Settings

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Click here to talk to an Online Operator NOW!

Email

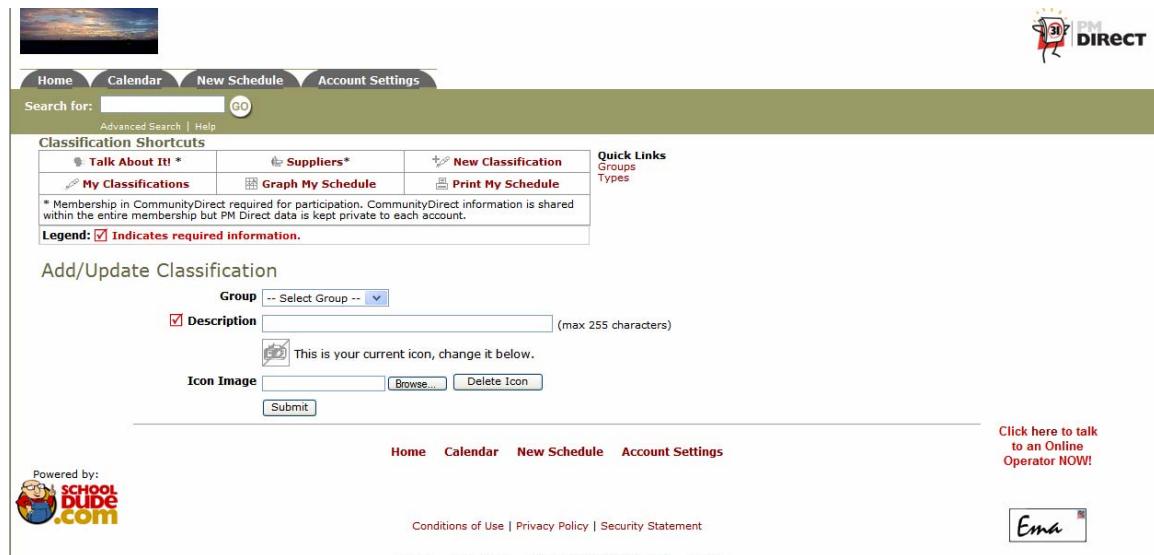


**SCHOOLDUDE SAYS:** To delete a Group, simply go to the My Groups page, click on the **name** of the Group you wish to delete, and when the Add/Update Group page opens up for that Group, click the **Delete** button.

**12. Classifications:** Classifications are just a way of breaking down equipment by what it's used for. For instance, a classification could be "lawn equipment" or "HVAC".

To get started adding Classifications, do the following:

- Click on the **Classifications** link on the **Account Settings** page.
- On the **My Classifications** page, click on the **+Add New Classification** link.
- You'll be taken to the **Add/Update Classification** page, which looks something like this:



- Select the appropriate **Group** from the drop-down box provided.
- Enter the **Classification** you would like to add into the **Description** field provided.
- If you have an icon you would like to use to mark this Classification, click the **Browse** button and add it. To delete an icon, just click the **Delete Icon** button provided.
- Click **Submit**.
- You will automatically be taken back to the **My Classifications** page, which will show that your new classification has been added.



**SCHOOLDUDE SAYS:** To edit or delete a classification, simply click on the **name** of the classification on the My Classifications page. On the Add/Update Classification page, either make the desired change and click **Submit** or scroll down and click **Delete Record**.



**SCHOOLDUDE SAYS:** You will NOT be able to delete a classification once there are costs associated with it.

**13. Types:** Types are a way of further narrowing the classification of your equipment. For instance, if your classification is “Lawn Equipment”, then your type could be “Lawn Mower” or “Leaf Blower”.

To get started adding Types, do the following:

- Click the **Types** link on the Account Settings page.
- On the **My Types** page, click the **+Add New Type** link.
- You will be taken to the Add/Update Type page, which will look something like this:

- Select the **Classification** of the equipment.
- In the box provided, enter the new **Type** of equipment that you wish to add.
- If you have an icon you would like to use to mark this Type, click the **Browse** button and add it. To delete an icon, just click the **Delete Icon** button provided.
- Click **Submit**.
- You will automatically be taken back to the **My Types** page, which will show that your new type has been added. See example on the next page:



**SCHOOLDUDE SAYS:** To edit or delete a type, simply click on the **name** of the type on the My Types page. On the Add/Update Type page, either make the desired change and click **Submit** or scroll down and click **Delete Record**.



**SCHOOLDUDE SAYS:** You will NOT be able to delete a type once there are costs associated with it.

**14. Projects (Project Codes):** Project Codes are another option intended to help simplify the reports process by further specifying the nature of the work to be done. In MaintenanceDirect, they provide a way to group several work orders together into a common project.

You can reach the My Projects page by clicking the **Projects** link in the Information Analysis section of your Home page or on the Account Settings page. Below is an example of the My Projects page, which will show any projects carried over from MaintenanceDirect:

The screenshot shows the 'My Projects' page in MaintenanceDirect. At the top, there are navigation links: Home, Calendar, New Schedule, and Account Settings. Below these are search fields for 'Search for:' and 'Advanced Search | Help'. A 'Project Shortcuts' section includes links for 'Talk About It!', 'Suppliers', 'New Projects', 'Graph My Schedules', and 'Print My Schedules'. A note states: 'Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.' A legend indicates that a yellow icon means 'Use Project Code in PMDirect' and a gray icon means 'Hide Project Code in PMDirect'. The 'Filtering' section shows a grid of letters (0-9, A-Z) and a 'All' option. The main table lists the single project: 'Playground Refurbishment'. It includes columns for 'Project Code' (dropdown), 'Project Description' (dropdown), '# PM Schedules' (0), and 'Estimated Cost' (\$0.00). Below the table are links for '+ Add New Project' and 'Print This!'. At the bottom, there are links for 'Home', 'Calendar', 'New Schedule', 'Account Settings', 'Conditions of Use', 'Privacy Policy', and 'Security Statement'. A 'Powered by: SCHOOLBUDDY.com' logo is on the left, and an 'Email' link is on the right. A note on the right says: 'Click here to talk to an Online Operator NOW!'.

- On this page, you can activate projects for which PM work will be done by clicking the gray **thumbs-down icon** to change it to a yellow thumbs-up icon (active).
- Also, you can click the **Add New Project** link to create a new Project. You'll be taken to a page where you can click the "**Click Here**" button to be redirected to the Add/Update Project page in MaintenanceDirect. You can add a new project there.

**15. Equipment:** This is where you can list all of the equipment that your educational facility has for maintenance purposes. This way, you can keep up with what equipment you have, warranty information, when and where it's being used, and more. You don't have to have all equipment entered before you start making schedules because you can always go back in and fill out equipment later.

To start entering your equipment's information, take the following steps:

- On the Account Settings page, click on the **Equipment** link.
- You will be taken to the **My Equipment** page, which will look something like this:

The screenshot shows the 'My Equipment' page of the PM Direct website. At the top, there's a navigation bar with links for Home, Calendar, New Schedule, and Account Settings. Below that is a search bar with a 'GO' button. The main content area is titled 'Equipment Shortcuts' with links for 'Talk About It!', Suppliers, New Equipment, My Equipment (which is highlighted in red), Graph, My Schedules, and Print. A note says 'Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.' Below this is a legend for sorting tables, a filtering section for item numbers, and a table header for 'My Equipment' with columns for Item Number, Classification, Date Placed In Service, Warranty Date, Last PM WO, Description, Model Number, Removed From Service, Days Until Expiration, # Scheduled PMs, Location, Serial Number, Area Number, and Area Description. The table shows one item: 'Lawn Mower 1'. At the bottom, there are links for 'Add New Equipment', 'Print This!', and 'Print to Excel'. A note says 'Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print My Schedules" options.' The footer includes links for Home, Calendar, New Schedule, Account Settings, and a 'Powered by' link to SchoolDude.com. There's also a 'Click here to talk to an Online Operator NOW!' button and an 'Email' link.

- On this page, click the **+Add New Equipment** link.
- You will be taken to the Add/Update Equipment page. Enter your equipment's information, including:
  - ✓ Item Number (required)
  - ✓ Classification
  - ✓ Type
  - ✓ Description: this is a good place to put any information you want to mention about the equipment like part number, filter size, etc.
  - ✓ Manufacturer
  - ✓ Supplier
  - ✓ Date purchased
  - ✓ Original Cost
  - ✓ Location
  - ✓ Building
  - ✓ Area
  - ✓ Area Number

- ✓ Tag Number
- ✓ Model Number
- ✓ Serial Number
- ✓ Out of Service Begin
- ✓ Out of Service End
- ✓ Date Placed
- ✓ Date Removed
- ✓ Warranty Expires
- ✓ Life Expectancy Unit
- ✓ Life Expectancy
- ✓ Notes: Use this space for anything you might want the technicians to know like what kind of oil is used, etc.
- ✓ Reading Measurement
- ✓ Current Reading
- ✓ Previous Reading
- ✓ Usage Unit of Measure: Comes in gallons only.

- Be sure to decide whether or not to include any notes you've made on the work order form when it prints.
- Click **Save**.

When the page refreshes, you will be taken back to the top of the **Add/Update Equipment** page, where you will see the words “New Equipment Saved Successfully!” in red near the top (see below).

Home    Calendar    New Schedule    Account Settings

Search for:

Advanced Search | Help

**Equipment Shortcuts**

<input type="button" value="Talk About It! *"/>	<input type="button" value="Suppliers *"/>	<input type="button" value="New"/>	<input type="button" value="Duplicate"/>	<input type="button" value="My Equipment"/>	<input type="button" value="Graph My Schedules"/>	<input type="button" value="Print My Schedules"/>
---	--	------------------------------------	--	---	---	---

\* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

Legend:  Indicates required information.

**Add/Update Equipment**

New equipment saved successfully!

**Item Number**

\* **Item Number is a primary sort.**  
Please use an identifier that will sort your equipment in an understandable way. You can use characters and/or numbers

Repeat this process until all of the desired equipment has been entered.

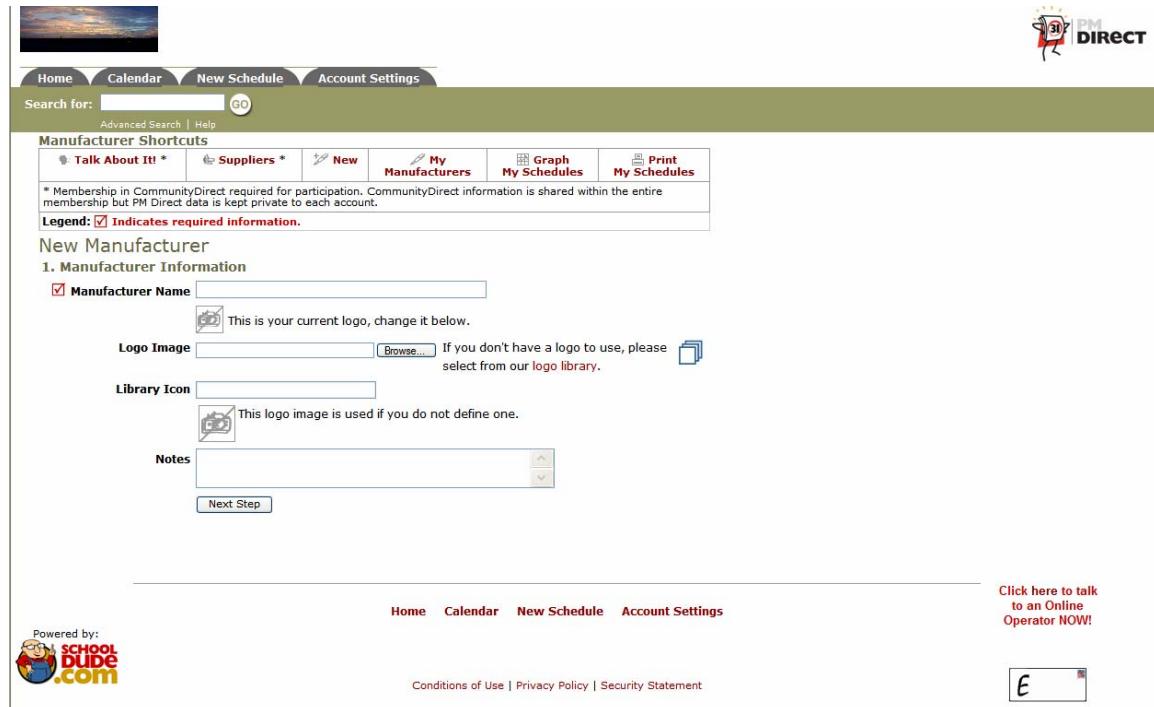


**SCHOOLDUDE SAYS:** Keep in mind that any equipment added in PMDirect will need to be activated/turned on in MaintenanceDirect!

**16. Manufacturers:** In this section, you can enter the information of any equipment manufacturers that your educational facility uses. This, like the Suppliers section, is optional, but comes in handy when running reports.

To get started adding Manufacturers, do the following:

- Click on the **Manufacturers** link on the Account Settings page.
- On the My Manufacturers page, click on the **+Add New Manufacturer** link.
- You will be taken to the New Manufacturer page, which will look like this:



- On this page, enter the **Manufacturer Name** in the field provided (this is the only required information).
- If you like, browse and enter the **Logo Image**, **Library Icon**, and/or any **notes** you would like to include.
- Click **Next Step**.
- Enter the **Manufacturer's Department Name**.

- Include the Department's **address**, **phone number**, **fax**, and any **notes** you wish to include, if available.
- Click **Save**.
- Then, click **Next Step**.
- Enter the **Web Site information** of the Manufacturer, including the Department, Web Site Description, and Web Site URL.
- Click **Next Step**.
- Define **Contacts**: Enter your contact information for this Manufacturer, including First and Last Name, Department, Phone, Fax, Email, etc.
- To add more contacts, click the **Add** button and repeat the last step.
- To finish up, click the **Finish** button.
- You will be taken back to the **My Manufacturers** page, which will show that your newest manufacturer has been added.



**SCHOOLDUDE SAYS:** To update manufacturer information, click on that manufacturer's **name** in the **My Manufacturers** list. Proceed through the steps above, making the desired changes to your manufacturer's information and click **Submit** when finished.



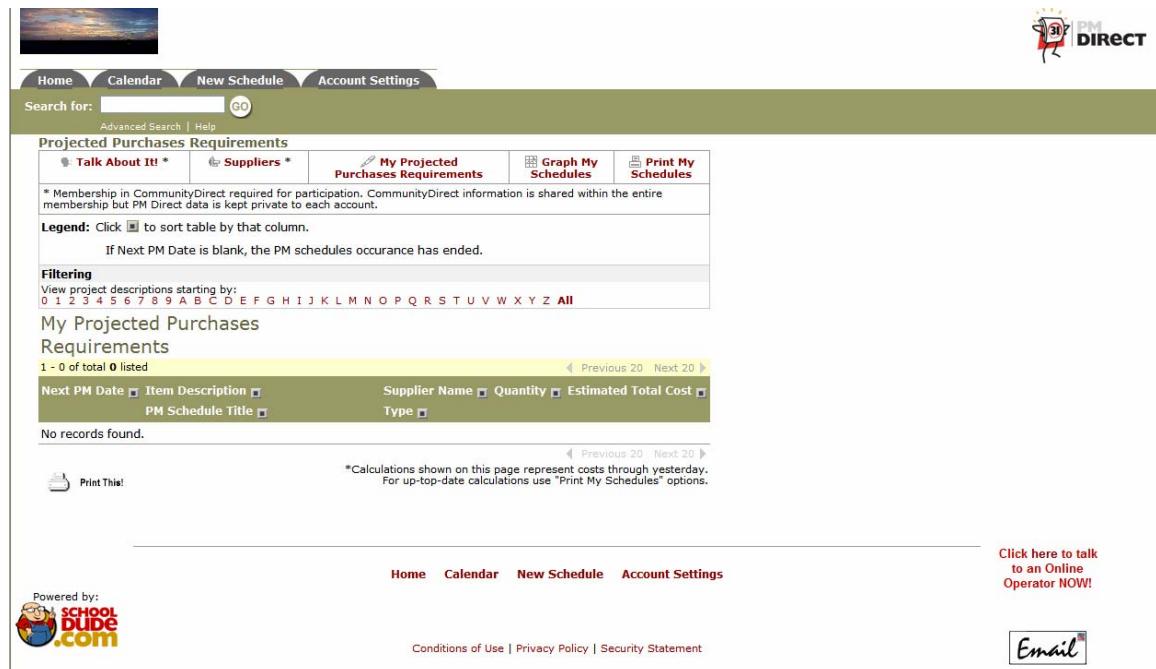
**SCHOOLDUDE SAYS:** To delete a manufacturer once it's been added and before any costs are tied to it, simply click on that manufacturer's **name** in the **My Manufacturers** list. In the first "New Manufacturer" step, click the **Delete** button at the bottom of the page, beneath the Notes field. A gray confirmation box will appear to make sure that you want to delete the manufacturer. Click **OK**. You will then be taken back to the **My Manufacturers** page, which will show that the manufacturer has been deleted.



**SCHOOLDUDE SAYS:** Keep in mind that you will NOT be able to delete a Manufacturer once you have costs associated with it.

## 17. Projected Purchases Requirements: The Projected Purchases Requirements page will list all parts and supplies from the Parts list in your schedules.

The list will be sorted by date for all the upcoming work orders scheduled for generation. This list is intended to give you an idea of the items needed from inventory or items you may need to purchase before the upcoming work orders can be completed.



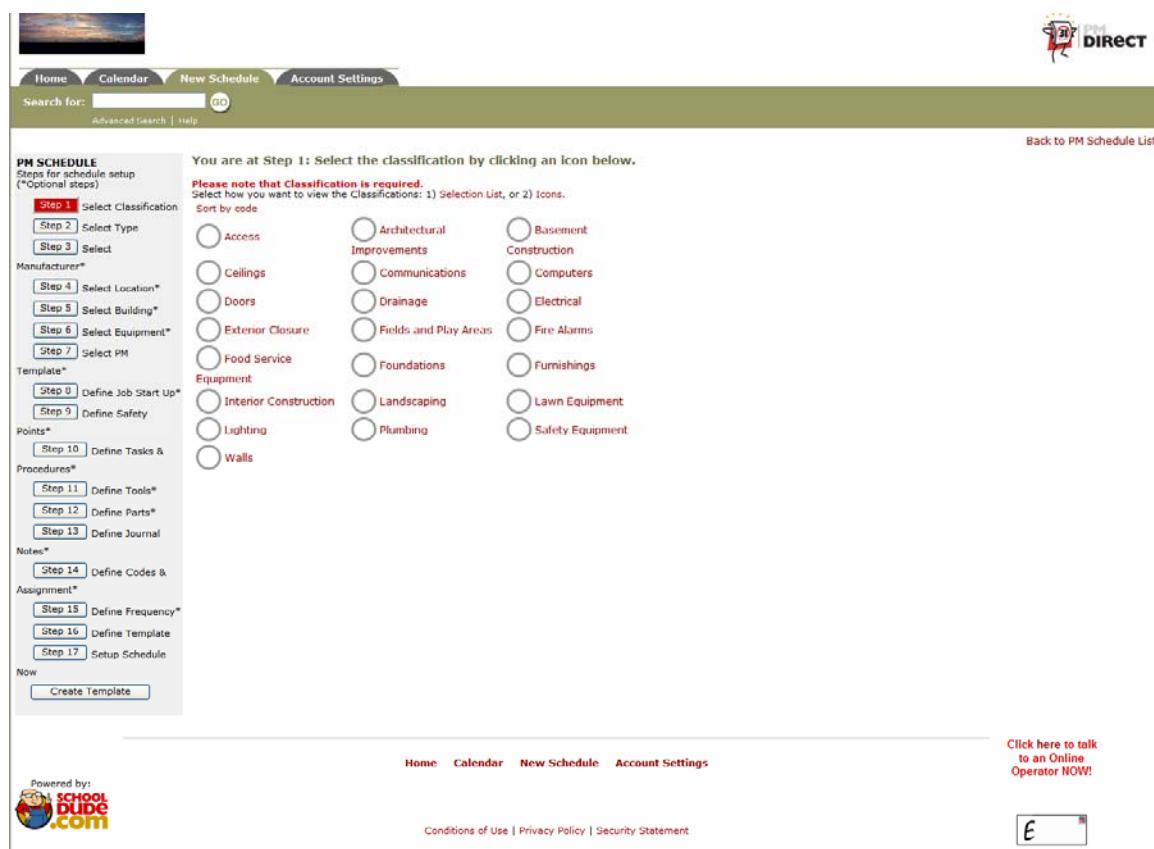
The screenshot shows the 'My Projected Purchases Requirements' section of the PM Direct website. At the top, there are navigation links: Home, Calendar, New Schedule, and Account Settings. Below these are search fields for 'Search for:' and 'Advanced Search' with a 'GO' button. The main content area is titled 'Projected Purchases Requirements' and includes a 'My Projected Purchases Requirements' button. A legend explains that a small icon indicates the PM Date is blank. A filtering section allows sorting by project descriptions starting with letters from 0 to Z. The table header includes columns for Next PM Date, Item Description, Supplier Name, Quantity, Estimated Total Cost, and Type. A note states 'No records found.' Below the table, a 'Print This!' button is available. At the bottom, there are links for 'Home', 'Calendar', 'New Schedule', 'Account Settings', 'Conditions of Use', 'Privacy Policy', and 'Security Statement'. A 'Click here to talk to an Online Operator NOW!' button is also present.

### III. Creating/Editing PM Schedules: Getting Down to Business!

Alright, so let's get started creating those PM schedules! To get going, click the **New Schedule** tab at the top of your **Home** page.

You'll be taken to step one in the 17-step PM Schedule creation process (we promise it's not as daunting as it may sound!). Fields marked with an asterisk (\*) are optional.

The first page will look something like this, depending on how many Classifications you have entered:



The screenshot shows the 'New Schedule' page. At the top, there are tabs for Home, Calendar, New Schedule (which is selected), and Account Settings. Below the tabs is a search bar with a 'GO' button and links for Advanced Search and Help. The main content area is titled 'PM SCHEDULE' and 'Steps for schedule setup (\*Optional steps)'. It lists 17 steps in a sidebar: Step 1 (Select Classification, highlighted in red), Step 2 (Select Type), Step 3 (Select Manufacturer), Step 4 (Select Location\*), Step 5 (Select Building\*), Step 6 (Select Equipment\*), Step 7 (Select PM), Step 8 (Define Job Start Up\*), Step 9 (Define Safety), Step 10 (Define Tasks & Procedures\*), Step 11 (Define Tools\*), Step 12 (Define Parts\*), Step 13 (Define Journal), Step 14 (Define Codes & Assignment\*), Step 15 (Define Frequency\*), Step 16 (Define Template), and Step 17 (Setup Schedule). The main area displays a grid of classification icons. A note at the top of the grid says: 'You are at Step 1: Select the classification by clicking an icon below. Please note that Classification is required. Select how you want to view the Classifications: 1) Selection List, or 2) Icons. Sort by code.' The icons are arranged in two columns: Access, Ceilings, Doors, Exterior Closure, Food Service, Interior Construction, Lighting, Walls, Architectural Improvements, Communications, Drainage, Fields and Play Areas, Foundations, Landscaping, Plumbing, Basement Construction, Computers, Electrical, Fire Alarms, Furnishings, Lawn Equipment, and Safety Equipment. At the bottom of the page, there is a 'Now' section with a 'Create Template' button, a 'Powered by: SCHOOL DUDE.com' logo, and a 'Click here to talk to an Online Operator NOW!' link. The bottom navigation bar includes Home, Calendar, New Schedule, and Account Settings, along with links for Conditions of Use, Privacy Policy, and Security Statement.

Simply follow the steps to create a schedule:

**Step 1:** Select the **Classification** (see page shown above).

## Step 2: Select the Type.



[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

Search for:   [Advanced Search](#) [Help](#)

[Back to PM Schedule List](#)

**PM SCHEDULE**  
Steps for schedule setup  
(\*Optional steps)

[Step 1](#) Lawn Equipment  
 [Step 2](#) Select Type  
 [Step 3](#) Select  
 [Step 4](#) Select Location\*  
 [Step 5](#) Select Building\*  
 [Step 6](#) Select Equipment\*  
 [Step 7](#) Select PM

**Template\***  
 [Step 8](#) Define Job Start Up\*  
 [Step 9](#) Define Safety

**Points\***  
 [Step 10](#) Define Tasks &

**Procedures\***  
 [Step 11](#) Define Tools\*  
 [Step 12](#) Define Parts\*  
 [Step 13](#) Define Journal

**Notes\***  
 [Step 14](#) Define Codes &

**Assignment\***  
 [Step 15](#) Define Frequency\*  
 [Step 16](#) Define Template  
 [Step 17](#) Setup Schedule

**Now**

You are at Step 2: Select the type by clicking an icon below.

[Previous Step](#) [Next Step](#)

Not applicable  
 Leaf Blower  Mower  
 Weed eater

---

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

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### Step 3: Select Manufacturer or choose Not Applicable.


SchoolDude **DIRECT**

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

Search for:

[Advanced Search](#) | [Help](#)

[Back to PM Schedule List](#)

You are at Step 3: Select manufacturer by clicking an icon below.

Previous Step

Not applicable

Manufacturer (view)

Southern Tool (view)

Next Step

Manufacturer 2 (view)

**PM SCHEDULE**  
 Steps for schedule setup  
 (\*Optional steps)

Step 1 Lawn Equipment  
 Step 2 Mower  
 Step 3 Select Manufacturer\*  
 Step 4 Select Location\*  
 Step 5 Select Building\*  
 Step 6 Select Equipment\*  
 Step 7 Select PM

Template\*  
 Step 8 Define Job Start Up\*  
 Step 9 Define Safety

Points\*  
 Step 10 Define Tasks &

Procedures\*  
 Step 11 Define Tools\*  
 Step 12 Define Parts\*  
 Step 13 Define Journal

Notes\*  
 Step 14 Define Codes &

Assignment\*  
 Step 15 Define Frequency\*  
 Step 16 Define Template  
 Step 17 Setup Schedule

Now

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[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

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**Step 4:** Select the **Location** or choose **Not Applicable**. Keep in mind that if you select “All Locations”, only one work order will be created with no location specified. If you would like one work order for each location, you will need to create a separate schedule for each.

You are at Step 4: Select location by clicking an icon below.

PM SCHEDULE  
Steps for schedule setup  
(\*Optional steps)

Step 1 Lawn Equipment  
 Step 2 Mower  
 Step 3 Southern Tool\*  
 Step 4 Select Location\*  
 Step 5 Select Building\*  
 Step 6 Selected Equipment\*  
 Step 7 Select PM  
Template\*  
 Step 8 Define Job Start Up\*  
 Step 9 Define Safety  
Points\*  
 Step 10 Define Tasks & Procedures\*  
 Step 11 Define Tools\*  
 Step 12 Define Parts\*  
 Step 13 Define Journal  
Notes\*  
 Step 14 Define Codes & Assignment\*  
 Step 15 Define Frequency\*  
 Step 16 Define Template  
 Step 17 Setup Schedule  
Now

[Previous Step](#) [Next Step](#)

Not applicable  
 ALL Locations  
 NorthEastern Sloan High  
 Sloan High School

[Back to PM Schedule List](#)

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Step 5: Select the **Building** or choose **Not Applicable**.

You are at Step 5: Select building by clicking an icon below.

Not applicable

All Buildings

Sloan Gymnasium

Step 3 Select Building\*

Step 6 Select Equipment\*

Step 7 Select PM

Template\*

Step 8 Define Job Start Up\*

Step 9 Define Safety

Points\*

Step 10 Define Tasks &

Procedures\*

Step 11 Define Tools\*

Step 12 Define Parts\*

Step 13 Define Journal

Notes\*

Step 14 Define Codes &

Assignment\*

Step 15 Define Frequency\*

Step 16 Define Template

Step 17 Setup Schedule

Now

Create Template

Show PM WO's

Delete

Home   Calendar   New Schedule   Account Settings

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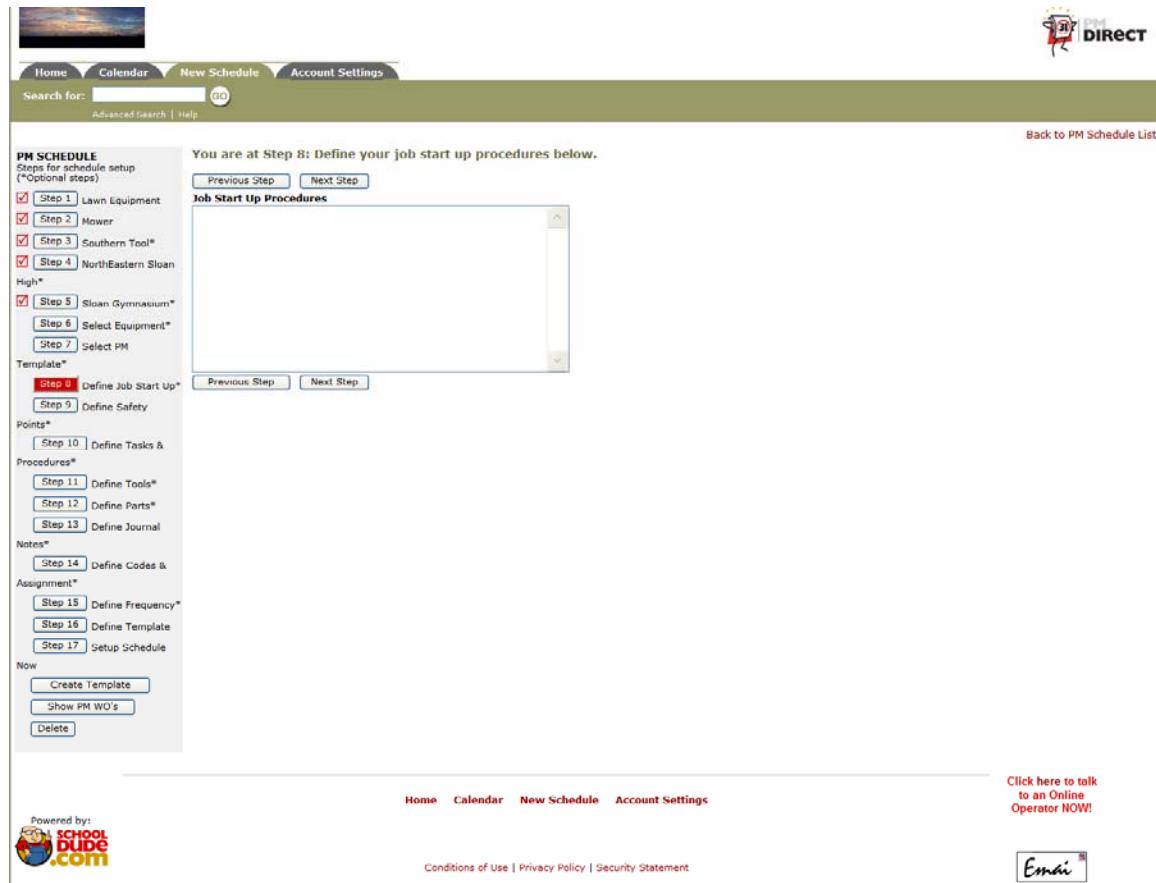
Click here to talk to an Online Operator NOW!

Email

Step 6: Select **Equipment**. Any equipment that matches what you have selected in the first five steps will be available here to choose from. If you need to create one work order for all work or separate work orders for each piece of equipment, keep this in mind.

Step 7: Select the **PM Template** from the library on this page or create your own schedule from scratch by clicking **Next Step**.

Step 8: Define your **Job Start-up Procedures** in the box provided. In other words, who needs to be notified? Click **Next Step**.



The screenshot shows a software interface for defining job start-up procedures. At the top, there is a navigation bar with links for Home, Calendar, New Schedule, and Account Settings. A search bar is also present. The main content area is titled "PM SCHEDULE" and "Steps for schedule setup (\*Optional steps)". It lists several steps with checkboxes, including Step 1 (Lawn Equipment), Step 2 (Mower), Step 3 (Southern Tool\*), Step 4 (NorthEastern Sloan High\*), Step 5 (Sloan Gymnasium\*), Step 6 (Selected Equipment\*), and Step 7 (Select PM). Below this, there are sections for "Template\*", "Points\*", "Procedures\*", "Notes\*", and "Assignment\*". Buttons for "Create Template", "Show PM WO's", and "Delete" are located at the bottom of the main form. At the bottom of the page, there are links for "Home", "Calendar", "New Schedule", "Account Settings", "Conditions of Use", "Privacy Policy", and "Security Statement". A "SchoolDude.com" logo is in the bottom left, and an "Email" link is in the bottom right. A banner at the top right says "Click here to talk to an Online Operator NOW!".

## Step 9: Define Safety Points. Click Next Step.

PM SCHEDULE  
Steps for schedule setup  
(\*Optional steps)

Step 1 Lawn Equipment  
 Step 2 Mower  
 Step 3 Southern Tool\*  
 Step 4 NorthEastern Sloan  
 High\*  
 Step 5 Sloan Gymnasium\*  
 Step 6 Selected Equipment\*  
 Step 7 Select PM  
 Template\*  
 Step 8 Define Job Start Up\*  
 Step 9 Define Safety  
 Points\*  
 Step 10 Define Tasks & Procedures\*  
 Step 11 Define Tools\*  
 Step 12 Define Parts\*  
 Step 13 Define Journal  
 Notes\*  
 Step 14 Define Codes & Assignment\*  
 Step 15 Define Frequency\*  
 Step 16 Define Template  
 Step 17 Setup Schedule  
 Now

You are at Step 9: Define your safety points below.

Previous Step Next Step

**Safety Points**

Previous Step Next Step

Home Calendar New Schedule Account Settings

Click here to talk to an Online Operator NOW!

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Step 10: Define tasks and procedures. To add more tasks, click the **More New Tasks** button. You can also decide in this step whether or not you want to have the task list printed on PM work orders by clicking the **check-box** provided at the top of the page. To continue, click **Next Step** when you're finished.



[Back to PM Schedule List](#)

You are at Step 10: Define your tasks and procedures below.  
To add more tasks simply click "More New Tasks" button below.

**Step 1** Lawn Equipment  
 **Step 2** Mower  
 **Step 3** Southern Tool\*  
 **Step 4** NorthEastern Sloan  
 High\*  
 **Step 5** Sloan Gymnasium\*  
 **Step 6** Select Equipment\*  
 **Step 7** Select PM  
 Template\*  
 **Step 8** Define Job Start Up\*  
 **Step 9** Define Safety  
 Points\*  
 **Step 10** Define Tasks & Procedures\*  
 **Step 11** Define Tools\*  
 **Step 12** Define Parts\*  
 **Step 13** Define Journal  
 Notes\*  
 **Step 14** Define Codes & Assignment\*  
 **Step 15** Define Frequency\*  
 **Step 16** Define Template  
 **Step 17** Setup Schedule  
 Now  
    

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

[Click here to talk to an Online Operator NOW!](#)

Powered by: 

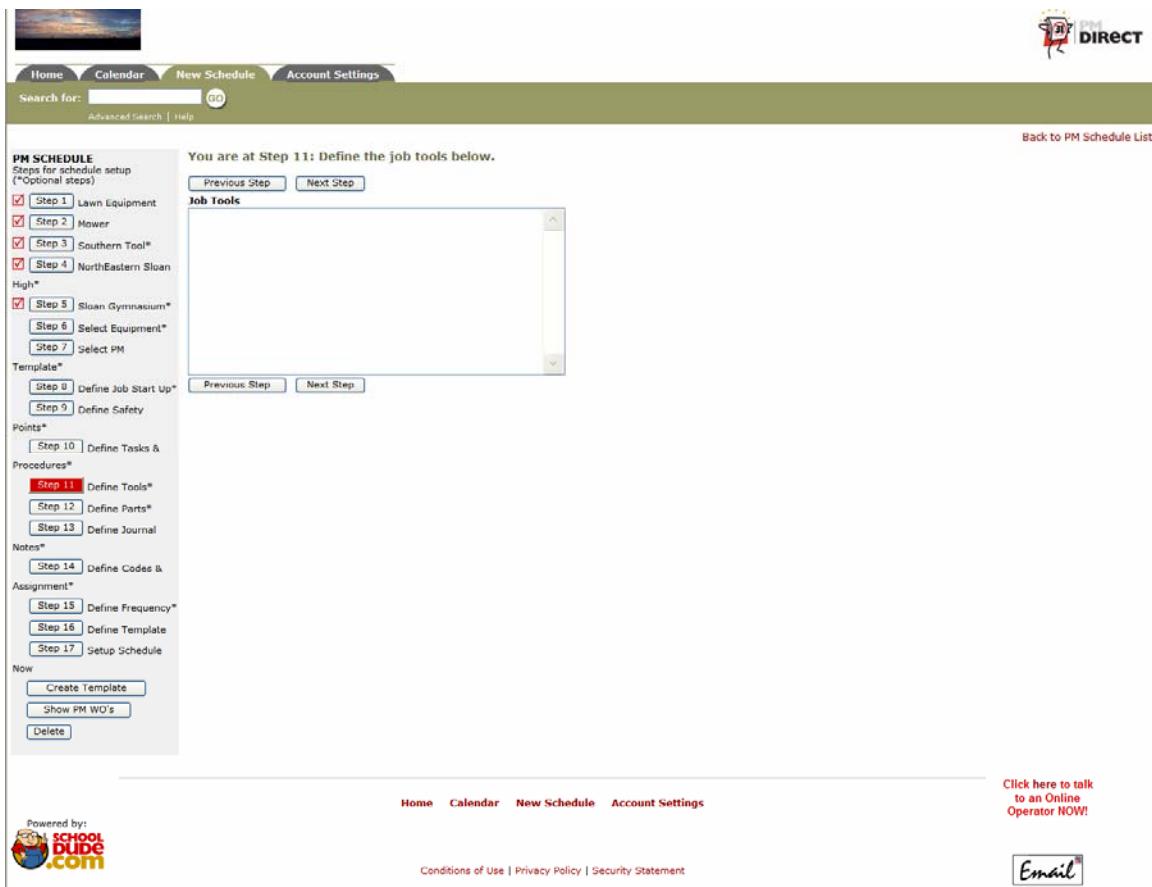
[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

[LOGIN](#) [SERVICES](#) [MY ACCOUNT \(123456789\)](#) [HELP](#)



Step II: Define your **Job Tools**. Then click **Next Step**.



The screenshot shows the 'Job Tools' setup page within the PM Schedule software. The top navigation bar includes 'Home', 'Calendar', 'New Schedule', and 'Account Settings'. A search bar with 'Search for:' and a 'GO' button is present. The main content area is titled 'You are at Step 11: Define the job tools below.' It features a 'Job Tools' section with a scrollable list. Below this are sections for 'Template\*', 'Points\*', 'Procedures\*', 'Notes\*', and 'Assignment\*'. At the bottom, there are buttons for 'Create Template', 'Show PM WO's', and 'Delete'. Navigation buttons 'Previous Step' and 'Next Step' are located at the top and bottom of the main content area. A 'Back to PM Schedule List' link is in the top right. The bottom of the page includes links for 'Home', 'Calendar', 'New Schedule', 'Account Settings', 'Conditions of Use', 'Privacy Policy', and 'Security Statement'. A 'Powered by: SCHOOL DUDE .COM' logo is on the left, and an 'Email' link is on the right. A 'Click here to talk to an Online Operator NOW!' button is also present.

Step 12: Define any **Purchases** (parts) needed to complete this PM job, using the fields provided. Click **Next Step** when you're finished.



[Back to PM Schedule List](#)

You are at Step 12: Define the purchases needed to complete this PM job.

\*Applies only to inventory transaction type.

<b>Transaction Type</b>	<input type="button" value="-- Select Type --"/>
<b>*Inventory Type</b>	<input type="button" value="-- Select Inv Type --"/>
*Item Number <input type="text"/>	
Item Description <input type="text"/>	
Pool / Location (Qty On Hand) <input type="button" value="Select Pool"/>	
Supplier <input type="button" value="-- Select Supplier --"/> OR NEW <input type="text"/>	
Quantity <input type="text"/>	
Est. Unit Cost <input type="text"/>	
Est. Total Cost <input type="text"/>	

**Job Parts**

Trns Type	Supplier OR New Supplier
Inventory Type	
Item Number	Item Description
Quantity	Pool / Location (Qty On Hand)
	Est. Unit Cost
	Est. Total Cost

PM SCHEDULE  
Steps for schedule setup  
(\*Optional steps)

**Step 1** Lawn Equipment  
 **Step 2** Mower  
 **Step 3** Southern Tool\*  
 **Step 4** NorthEastern Sloan  
 High\*  
 **Step 5** Sloan Gymnasium\*  
 **Step 6** Selected Equipment\*  
 **Step 7** Select PM  
 Template\*  
 **Step 8** Define Job Start Up\*  
 **Step 9** Define Safety  
 Points\*  
 **Step 10** Define Tasks &  
 Procedures\*  
 **Step 11** Define Tools\*  
 **Step 12** Define Parts\*  
 **Step 13** Define Journal  
 Notes\*  
 **Step 14** Define Codes &  
 Assignment\*  
 **Step 15** Define Frequency\*  
 **Step 16** Define Template  
 **Step 17** Setup Schedule

Now

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Step 13: Include any **notes** you wish to add by clicking the **New Note** link, shown in red on this page. Click **Next Step**.



Back to PM Schedule List

You are at Step 13: Define journal notes by clicking "New Note" below.

[Previous Step](#) [Next Step](#)

**New Note**

Date	Journal Note
	There are no defined Journal Notes at this time.

[Previous Step](#) [Next Step](#)

**PM SCHEDULE**  
Steps for schedule setup  
(\*Optional steps)

[Step 1](#) Lawn Equipment  
 [Step 2](#) Mower  
 [Step 3](#) Southern Tool\*  
 [Step 4](#) NorthEastern Sloan  
**High\***  
 [Step 5](#) Sloan Gymnasium\*  
 [Step 6](#) Selected Equipment\*  
 [Step 7](#) Select PM  
**Template\***  
 [Step 8](#) Define Job Start Up\*  
 [Step 9](#) Define Safety

**Points\***  
 [Step 10](#) Define Tasks & Procedures\*  
 [Step 11](#) Define Tools\*  
 [Step 12](#) Define Parts\*  
 [Step 13](#) Define Journal Notes\*  
 [Step 14](#) Define Codes & Assignment\*  
 [Step 15](#) Define Frequency\*  
 [Step 16](#) Define Template  
 [Step 17](#) Setup Schedule

**Now**

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Step 14: Define the **assignment, codes**, and **estimate job hours**, using the drop-down boxes provided. Click **Next Step**.


  
[Back to PM Schedule List](#)

**PM SCHEDULE**  
Steps for schedule setup  
(\*Optional steps)

**Step 1** Lawn Equipment  
 **Step 2** Mower  
 **Step 3** Southern Tool\*  
 **Step 4** NorthEastern Sloan

**High\***  
 **Step 5** Sloan Gymnasium\*  
 **Step 6** Selected Equipment\*  
 **Step 7** Select PM

**Template\***  
 **Step 8** Define Job Start Up\*  
 **Step 9** Define Safety

**Points\***  
 **Step 10** Define Tasks & Procedures\*  
 **Step 11** Define Tools\*  
 **Step 12** Define Parts\*  
 **Step 13** Define Journal

**Notes\***  
 **Step 14** Define Codes & Assignment\*  
 **Step 15** Define Frequency\*  
 **Step 16** Define Template  
 **Step 17** Setup Schedule

**Now**

You are at Step 14: Define the assignment, codes and estimate job hours below.

**Assigned To**  **Estimated Hours**  (Hours to complete job)

**Craft**

**Budget**   Use Budget Code assigned to location

**Project**

**Category**

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Step 15: Define the **frequency** of the schedule, selecting a start and end date and the recurrence pattern. Also select any **event exceptions** in your facility's calendar for this PM schedule. Click **Next Step**.

PM SCHEDULE

Steps for schedule setup  
(\*Optional steps)

Step 1: Lawn Equipment  
 Step 2: Mower  
 Step 3: Southern Tool\*  
 Step 4: NorthEastern Sloan  
 High\*  
 Step 5: Sloan Gymnasium\*  
 Step 6: Select Equipment\*  
 Step 7: Select PM  
 Template\*  
 Step 8: Define Job Start Up\*  
 Step 9: Define Safety  
 Points\*  
 Step 10: Define Tasks & Procedures\*  
 Step 11: Define Tools\*  
 Step 12: Define Parts\*  
 Step 13: Define Journal  
 Notes\*  
 Step 14: Define Codes & Assignment\*  
 Step 15: Define Frequency\*  
 Step 16: Define Template  
 Step 17: Setup Schedule

Now

You are at Step 15: Define the frequency schedule below.

Number of days allowed to complete PM WO

Recurrence Pattern

Recurring Calendar Event  
 Recurring Calendar Event Or Reading Frequency  
 Reading Frequency

Range of Recurrence

Start

No end date  
 End after  occurrences  
 End by

**School Event Exceptions**

Please check the events below for which you want to EXCLUDE PM Work Order generation. This means generating a PM work order will be skipped if an event is scheduled at the assigned location. For example, you could setup a Custodial Cleaning PM Schedule that excludes generating PM work orders during summer break. PM Schedules assigned all locations reviews school events assigned to all locations.

Christmas Break  
 Fall Break  
 Matt's Birthday  
 Phil Day  
 Spring Break  
 Teacher Work Day (November)  
 Test Event

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[Click here to talk to an Online Operator NOW!](#)

[Email](#)

**Step 16: Create a PM template** by deciding if you want to make this schedule available in your template book for recurring use. Enter a template title and click **Create Template Now**. Then click **Next Step**.



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Search for:

[Advanced Search](#) | [Help](#)

**PM SCHEDULE**  
Steps for schedule setup  
(\*Optional steps)

[Step 1](#) Lawn Equipment

[Step 2](#) Mower

[Step 3](#) Southern Tool\*

[Step 4](#) NorthEastern Sloan

High\*

[Step 5](#) Sloan Gymnasium\*

[Step 6](#) Selected Equipment\*

[Step 7](#) Select PM

**Template\***

[Step 8](#) Define Job Start Up\*

[Step 9](#) Define Safety

**Points\***

[Step 10](#) Define Tasks & Procedures\*

[Step 11](#) Define Tools\*

[Step 12](#) Define Parts\*

[Step 13](#) Define Journal

**Notes\***

[Step 14](#) Define Codes & Assignment\*

[Step 15](#) Define Frequency\*

**Step 16** Define Template

[Step 17](#) Setup Schedule

**Now**

[Create Template](#)

[Show PM WO's](#)

[Delete](#)

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

[Click here to talk to an Online Operator NOW!](#)



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**Step 17:** This step shows you a summary of the PM schedule you just created but there are a couple of actions left to take:

PM SCHEDULE  
Steps for schedule setup  
(\*Optional steps)

Step 1 Lawn Equipment  
 Step 2 Mower  
 Step 3 Southern Tool\*  
 Step 4 NorthEastern Sloan High  
 Step 5 Sloan Gymnasium\*  
 Step 6 Selected Equipment\*  
 Step 7 Select PM  
 Step 8 Define Job Start Up\*  
 Step 9 Define Safety  
 Step 10 Define Tasks & Procedures\*  
 Step 11 Define Tools\*  
 Step 12 Define Parts\*  
 Step 13 Define Journal  
 Step 14 Define Codes & Assignment\*  
 Step 15 Define Frequency\*  
 Step 16 Define Template  
 Step 17 Setup Schedule

Classification: **Lawn Equipment**  
 Type: **Mower**  
 Manufacturer: **Southern Tool**  
 Location: **NorthEastern Sloan High**  
 Building: **Sloan Gymnasium**  
 Equipment: **0 piece(s) of equipment defined**  
 Task: **0 tasks, due**  
 Job Purchases: **0 items needed for the job**  
 Journal Notes: **0 Journal Notes defined**  
 Recurrence Pattern: **Weekly**  
 Date Schedule Start: **12/21/2006**  
 Date Schedule End: **no end date**

**You are at Step 17: Summary**

**Below is your new schedule summary:**

**Schedule Title**  
 PM Schedule created on 12/20/2006

Note: The title is used in reports and the calendar. It should be both brief and informative.

**High\***

**Template\***

**Points\***

**Procedures\***

**Setup Schedule Now**

**Now**

**Create Template** **Show PM WO's** **Delete**

**Home** **Calendar** **New Schedule** **Account Settings**

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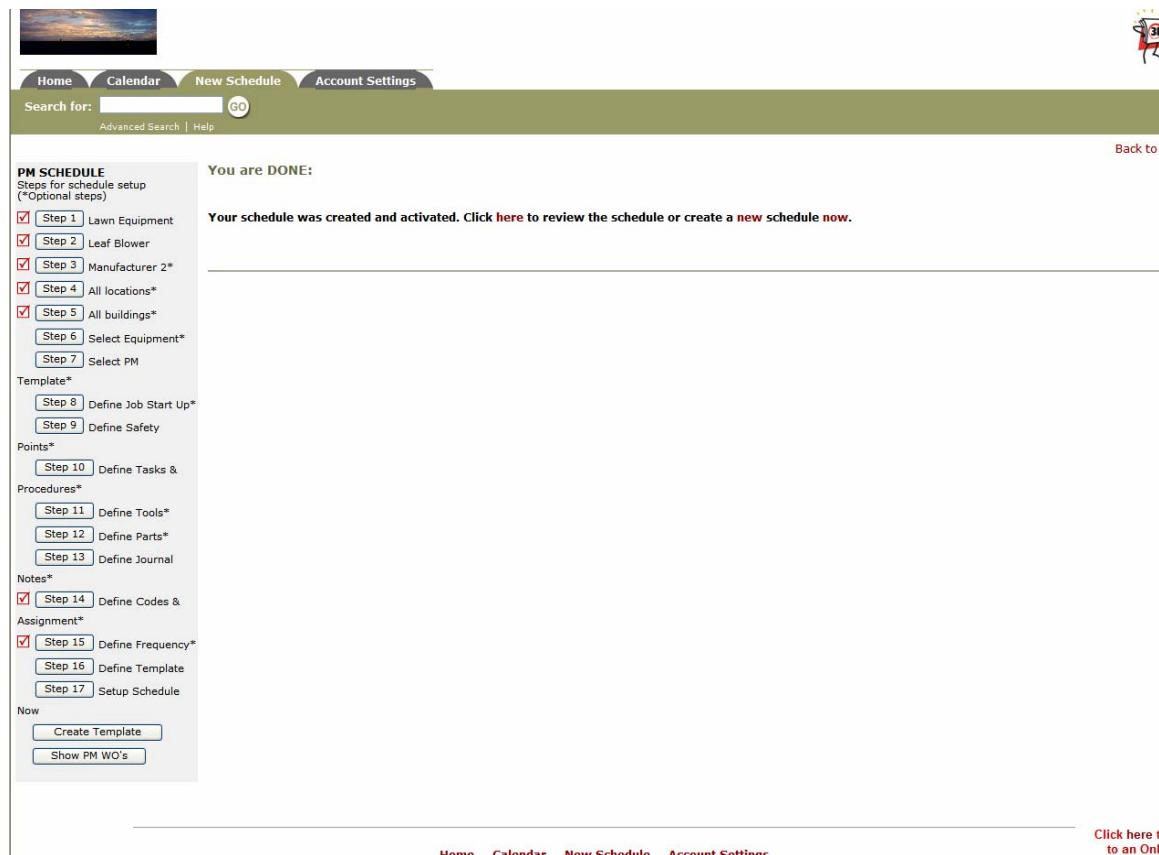
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- First off, you'll notice that in the Schedule Title box near the top of the page, you'll see the words "PM Schedule created on..." with today's date. This will default as the title of the schedule unless you change it. To create your own customized title for the schedule, simply clear the text out of this box and enter your own.
- Click **Set Up Schedule Now**.

That's it! You're finished! You should see a screen that says as much: "You Are Done: Your schedule was created and activated. Click here to review the schedule or create a new schedule now." See below:



**PM SCHEDULE**  
Steps for schedule setup  
(\*Optional steps)

Step 1 | Lawn Equipment  
 Step 2 | Leaf Blower  
 Step 3 | Manufacturer 2\*  
 Step 4 | All locations\*  
 Step 5 | All buildings\*  
 Step 6 | Select Equipment\*  
 Step 7 | Select PM  
 Template\*  
 Step 8 | Define Job Start Up\*  
 Step 9 | Define Safety  
 Points\*  
 Step 10 | Define Tasks & Procedures\*  
 Step 11 | Define Tools\*  
 Step 12 | Define Parts\*  
 Step 13 | Define Journal  
 Notes\*  
 Step 14 | Define Codes & Assignment\*  
 Step 15 | Define Frequency\*  
 Step 16 | Define Template  
 Step 17 | Setup Schedule

Now

[Create Template](#)  
[Show PM WO's](#)

**You are DONE:**

Your schedule was created and activated. Click [here](#) to review the schedule or create a [new schedule now](#).

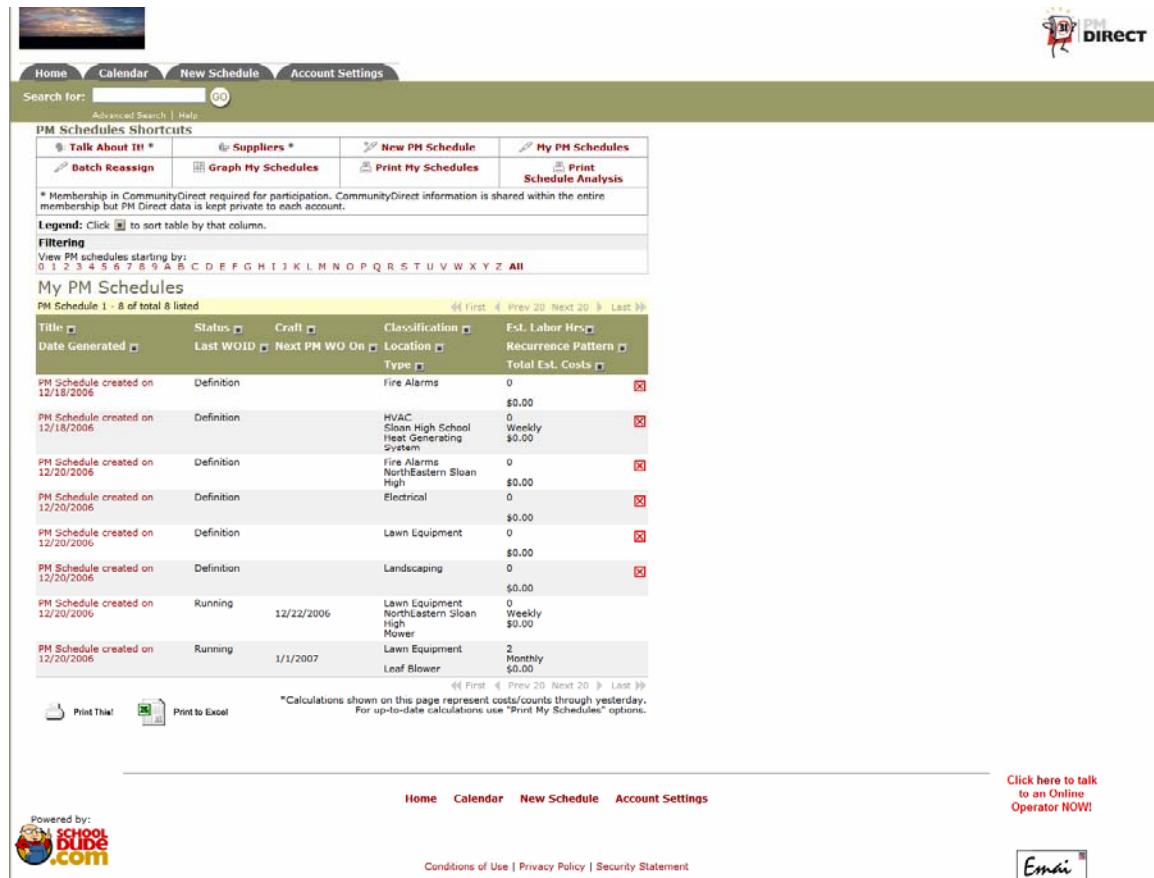
[Back to](#)

[Home](#) [Calendar](#) [New Schedule](#) [Account Settings](#)

Click here to go to an Online

## Editing a Schedule:

To take a look at a schedule and make any necessary changes, just visit the **My PM Schedules** page by clicking on the **My PM Schedules shortcut** or on the **PM Schedules** link in the Information Analysis section of your **Home** page. See below:



The screenshot shows the 'My PM Schedules' page with the following details:

**Header:** Includes a logo for 'DIRECT', a search bar, and navigation links for Home, Calendar, New Schedule, and Account Settings.

**Section Headers:** 'PM Schedules Shortcuts' and 'My PM Schedules'.

**Table Headers:** Title, Status, Craft, Classification, Est. Labor Hrs, Recurrence Pattern, Total Est. Costs.

**Table Data:** A list of 8 PM schedules, each with a creation date, status, last WO ID, next PM WO On, location, and type. For example, the first schedule was created on 12/18/2006, is a 'Definition' type, and is located at 'Sloan High School Heat Generating System'.

**Buttons:** Print This, Print to Excel.

**Text:** A note about calculations and a link to 'Print My Schedules'.

**Footer:** Includes links for Home, Calendar, New Schedule, Account Settings, and a link to 'Click here to talk to an Online Operator NOW!'.

## IV. Searching for Schedules: The Information You Want, When You Want It.

Once you've gotten into the system and learned how to find your way around and create PM Schedules, the next thing you'll want to know is how to find the information you need concerning the schedules you've created!

To get started, let's take a look at the two different types of searches that you can perform within PMDirect:

1. Search
2. Advanced Search

**1. Search:** This is the simplest of the searches you can perform. You can search for schedules using the search text box, located in the green tab bar near the top, left-hand side of every page. See below:



A screenshot of the PMDirect homepage. At the top, there is a green navigation bar with tabs for Home, Calendar, New Schedule, and Account Settings. Below this is a search bar with the placeholder "Search for:" and a "GO" button. A red arrow points to the search bar. Below the search bar, there are two buttons: "Advanced Search" and "Help". At the bottom of the page, there are two tabs: "SPECIAL" and "Projected PM Labor Hours".

- In this box, you can enter a **name**, **location**, **key word**, etc. and click **Go** to search for the schedule or information that you need.

For example, if you were searching for a schedule that referenced Alfred Dude, you'd simply enter his **name** in the "Search For" box and click **Go**. A list of all schedules that referenced him would then be pulled up on a "Search Results" page. See below:

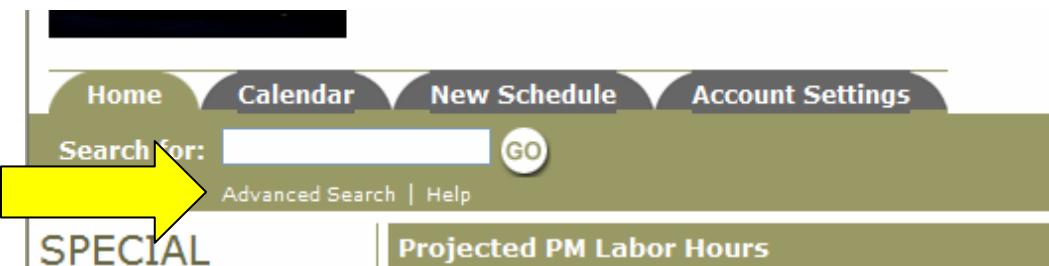


A screenshot of the PMDirect search results page. The search term "alfred dude" is entered in the search bar. The results table has columns for Title, Frequency, Classification, Type, Manufacturer, Location, Last WO ID, WO Status, and Next Projected Generation Date. The results show one entry: "PM Schedule created on 12/20/2006".

Title	Frequency	Classification	Type	Manufacturer	Last WO ID	WO Status	Next Projected Generation Date
PM Schedule created on 12/20/2006	Monthly	Lawn Equipment	Leaf Blower	Manufacturer 2	117	Pending	2/5/2007

You can then click on that schedule's **title** to view the schedule itself.

2. Advanced Search: Underneath the search field discussed above, you will see a link that says “Advanced Search”:



Clicking on this link will take you to the PMDirect Advanced Search page, which looks like this:

The screenshot shows the 'PM Direct Advanced Search' page. The page has a green header bar with links for 'Home', 'Calendar', 'New Schedule', and 'Account Settings'. Below the header is a search bar with the placeholder 'Search for:' and a 'GO' button. To the right of the search bar is a link 'Advanced Search | Help'. The main content area is titled 'PM Direct Advanced Search' and contains several search filters:

- Group:** Includes 'Select All Groups' and a list of categories: Equipment, Fire Safety, Lighting, Power, Heating/Air, and Recreational Equipment.
- Classification:** Includes 'Include All Classifications' and a list of items: Access, Architectural Improvements, Basement Construction, Doors, Communications, Computers, Doors, Drainage, Electrical, and more.
- Type:** Includes 'Include All Types' and a list of items: Air Handler Unit, Cooling Generating System, Distribution System, Fan Supply, Heat Generating System, Leaf Blower, Mower, Split System A/C Unit, and System Testing and Balancing.
- Manufacturer:** Includes 'Include All Manufacturer' and a list of manufacturers: Manufacturer, Manufacturer 2, and Southern Tool.
- Location:** Includes 'Include All Locations' and a list of locations: NorthEastern, Sloan High, Sloan High School, and more.
- Building:** Includes 'Include All Buildings' and a list of buildings: C. Lloyd Auditorium, Sloan Gymnasium, and more.
- Assigned To:** Includes 'Include All Assignees' and a list of assignees: Administrator, SchoolDude, Dude, Ahmed, Dude, Ben, Dude, Charles, Dude, Howard, Dude, Iff, and Dude, Tammy.
- Craft:** Includes 'Include All Crafts'.
- Budget:** Includes 'Include All Budget Accounts' and a list: Library Fund Any monies allotted.
- Project:** Includes 'Include All Projects'.
- Frequency:** Includes 'Include All Frequencies' and a list: Daily, Weekly, Monthly, and Annually.
- Equipment:** Includes 'Include All Equipments' and a list: Lawn Mower 1, Lawn Mower 2, and more.
- Job Start Up Procedures:** (empty field)
- Safety Points:** (empty field)
- Tasks & Procedures:** (empty field)
- Tools:** (empty field)
- Parts:** (empty field)
- Title:** (empty field)
- Custom Report Title:** (empty field)

At the bottom of the page are links for 'Advanced Search Results' and 'Search NOW'. There is also a 'Powered by: SCHOOL DUDE' logo and a link 'Click here to talk to an Online Operator NOW!'.

You should see here all of the information that you entered during the Account Setup process, as far as the names of Groups, Classifications, Types, Manufacturers, Locations, Buildings, Users, Crafts, Budgets, Projects, Frequency, and Equipment.

On this page, you may choose any combination of search options from the listings provided, as well as the fields shown on the bottom half of the page.

- Enter your search criteria and click the **Search Now** button. A list of all work orders that meet those particular criteria will appear.
- To print out the results list, click on the **Print This** or **Print to Excel** icon at the bottom of the results page.
- To view a specific schedule, click on the schedule's **name**.



**SCHOOLDUDE SAYS:** Narrow your Advanced Search criteria by choosing one of the two shortcuts near the top of the screen, based on what information you're looking for: PM Work Order Search or Equipment Search:

Home    Calendar    New Schedule    Account Settings

Search for:

Advanced Search | Help

**Advanced Search Shortcuts**

**PM Direct Advanced Search**

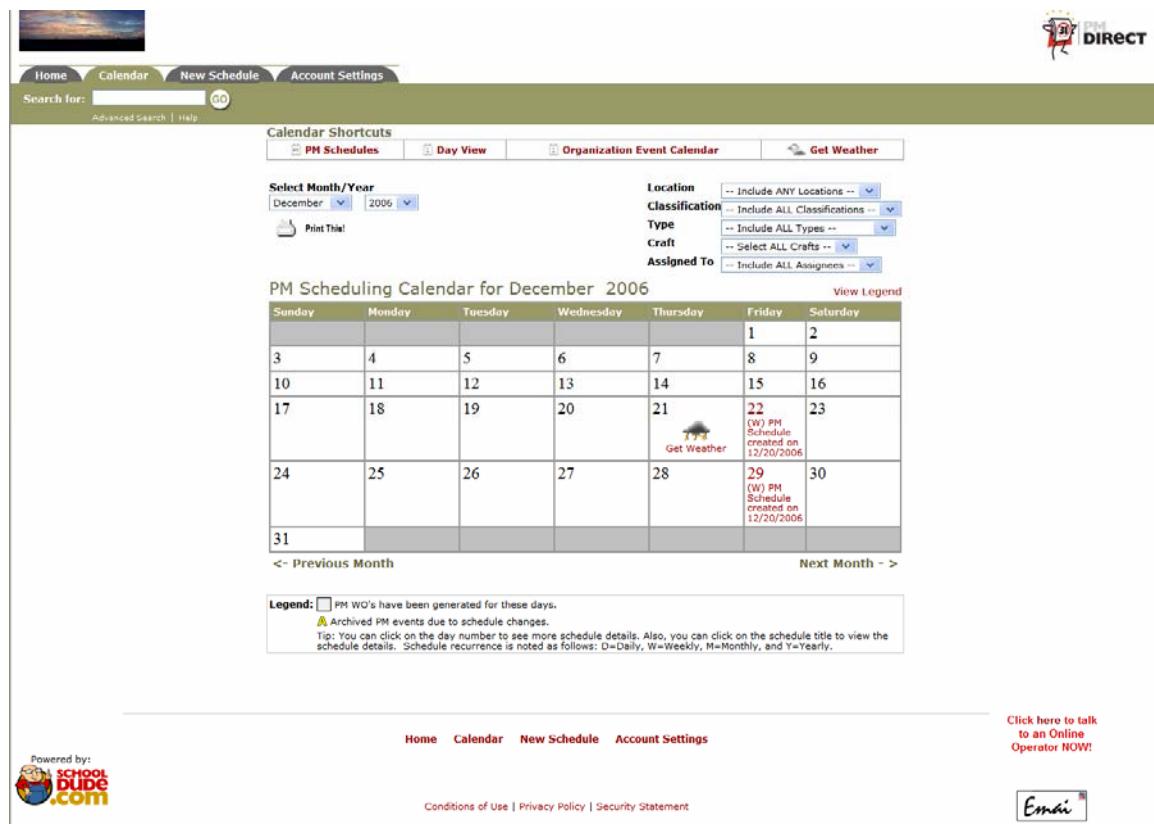
Tip: To select multiple choices in each list box use the Ctrl key to select.

## V. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, PMDirect has a **Calendar tab**—a place you can go to see what's going on, where, when, and who's involved. You can see, in easy-to-read calendar format, work orders and PM schedules entered on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we'll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the **Calendar tab** at the top of your screen.

The page that opens up will look something like this:



The screenshot shows the PMDirect calendar interface for December 2006. At the top, there's a navigation bar with links for Home, Calendar, New Schedule, and Account Settings. Below that is a search bar with a 'GO' button and links for Advanced Search and Help. The main area is titled 'Calendar Shortcuts' with four options: PM Schedules, Day View, Organization Event Calendar, and Get Weather. Under 'Select Month/Year', the month is set to December 2006. To the right are filters for Location, Classification, Type, Craft, and Assigned To. The main calendar grid shows days from Sunday to Saturday. The 22nd is highlighted with a yellow sun icon and a tooltip: '(W) PM Schedule created on 12/20/2006'. The 29th is also highlighted with a tooltip: '(W) PM Schedule created on 12/20/2006'. Below the calendar are buttons for '<- Previous Month' and 'Next Month - >'. A legend at the bottom left explains symbols: a box for PM WO's, an arrow for archived events, and a tip about clicking on day numbers for schedule details. At the bottom, there's a 'View Legend' link, a 'Home' link, and a 'Click here to talk to an Online Operator NOW!' link. The footer includes a 'Powered by: SCHOOL DUDE .COM' logo, links for Conditions of Use, Privacy Policy, and Security Statement, and an 'Email' link.

At the top of your screen, just above the words “Select Month/Year”, are the **Calendar Shortcuts**: **PM Schedules**, **Day View**, **Organization Event Calendar**, and **Get Weather**.

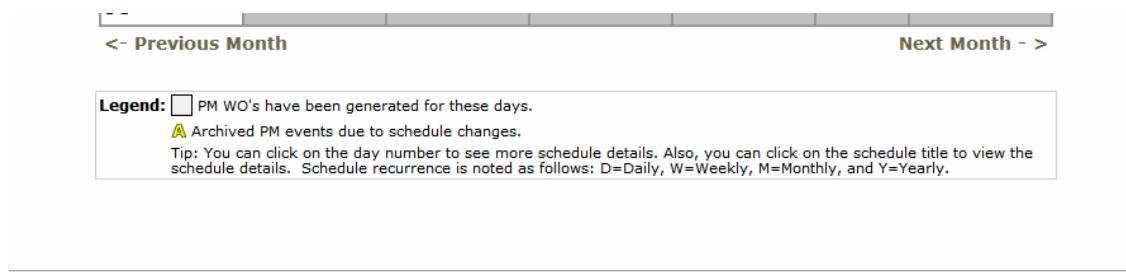
In this section, we'll cover each of these shortcuts in turn, starting with the Month View, which is the view that automatically shows (as seen above) when you click on the **Calendar tab**.

1. The Month View page shows you what's going on, on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The current month will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the **Previous Month** and **Next Month** buttons.

On the Month View, each day shows in the traditional squares of a calendar, which contain any schedules for the month that will generate work orders.

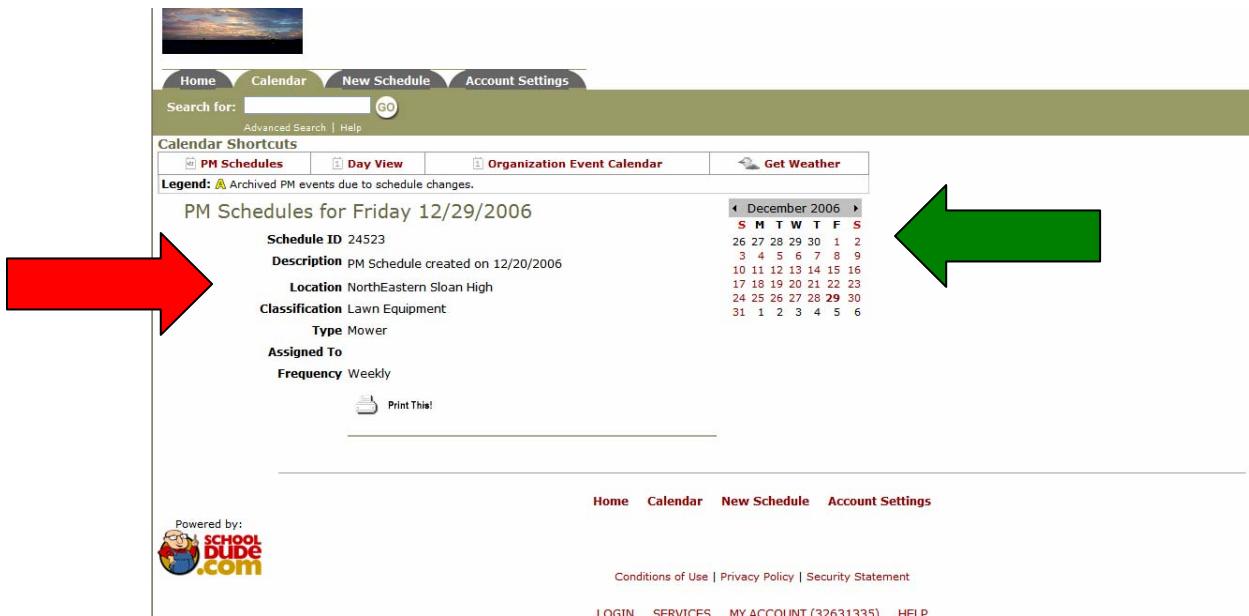
There are different icons used throughout the PMDirect **Calendar** page to indicate what kind of schedules are on the calendar. The legend for these icons is at the bottom of the Month View page and looks like this:



**SCHOOLDUDE SAYS:** PM schedules will be displayed on the calendar as red links and appear on the day of that schedule's Target Start Date. If you click on a schedule link on the calendar, it will take you to that PM schedule's setup page 1.

2. To reach the Day View page of your calendar, click the **Day View shortcut** at the top of the page

The Day View automatically defaults to today's date and shows you what's going on, one day at a time. You will see any schedules assigned to each particular day, who the work order was assigned to (if applicable), the Schedule ID number, the Description (date created), the Location Name, the Classification, the Type, and the Frequency. See area marked with the red arrow below:



PM Schedules for Friday 12/29/2006

**Schedule ID:** 24523  
**Description:** PM Schedule created on 12/20/2006  
**Location:** NorthEastern Sloan High  
**Classification:** Lawn Equipment  
**Type:** Mower  
**Assigned To:**  
**Frequency:** Weekly

[Print This!](#)

Legend: Archived PM events due to schedule changes.

Get Weather

December 2006

S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Home   Calendar   New Schedule   Account Settings

Powered by: SCHOOLDUDE.com

Conditions of Use | Privacy Policy | Security Statement

LOGIN   SERVICES   MY ACCOUNT (32631335)   HELP



**SCHOOLDUDE SAYS:** You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the **number** of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see below).

December 2006						
S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6



**SCHOOLDUDE SAYS:** To print a form for a schedule, click on the **Print This** button for the corresponding schedule.

3. The Organization Event Calendar page is where you can view and enter events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the **short cut** at the top of the **Calendar** page.

The Organization Event Calendar page should look something like this:

The screenshot shows the 'Organization Event Calendar' page. At the top, there are navigation links: Home, Calendar, New Schedule, and Account Settings. Below these are search fields for 'Search for:' and a 'GO' button. A red arrow points to the 'Event Title' link in the 'Add New Event' section of the header. The main content area is a yearly calendar for 2006, with month-by-month grids. To the right of the calendar, a list of events is displayed with columns for Date, Event Title, and Date Created. The events include Fall Break, Matt's Birthday, Teacher Work Day (November), Christmas Break, Test Event 2, and Spring Break. At the bottom of the page, there are links for Home, Calendar, New Schedule, Account Settings, and a 'Click here to talk to an Online Operator NOW!' button. A 'Powered by: SCHOOL DUDE.com' logo is also present.

To enter an event into the Organization Event Calendar, you'll need to start by creating an Event Title for that event and proceeding from there:

- To enter your Event Title, click on the **Event Title** link (shown in red above the Select Event Type drop-down box. See red arrow above).
- Clicking on the Event Title link will take you to a new page titled **Add/Update Event Code**. In the box provided next to the word Title, enter the **title** of the event. See next page:

- Click **Submit**.

- You will then be taken to the **Calendar Event Types** page, which will look something like this, depending on the events you have or haven't entered yet:

- Return to the Organization Event Calendar page by clicking on the **Organization Event Calendar** shortcut at the top of the page.

Your event's title has been entered, but the event itself still isn't on the calendar so to put it on the calendar, continue with the following:

- Select the **Location** for the event from the drop-down box provided just under the shortcuts section (see red arrow below). If this event will be for **ALL** locations, click the check box next to "Create for ALL Locations". See green arrow below:

The screenshot shows the 'Organization Event Calendar' page. At the top, there are navigation links: Home, Calendar, New Schedule, and Account Settings. Below these are search fields for 'Search for:' and 'Advanced Search | Help'. A large red arrow points to the 'Location' dropdown menu. A green arrow points to the 'Create for ALL Locations' checkbox. The main area shows a monthly calendar for 2006 from January to June. To the right of the calendar is a list of events with columns for 'Begin Date', 'End Date', 'Event Title', and 'Date Created'. The events listed are Fall Break, Matt's Birthday, Teacher Work Day (November), Christmas Break, Test Event 2, and Spring Break.

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
11/28/2005	11/28/2005	Teacher Work Day (November)	11/16/2005
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:12 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM

- Next, enter the **Begin** and **End Dates** of the event in the boxes provided.
- Choose the **Event Title** that you entered earlier from the "Select Event Type" drop-down box provided.
- Click **Submit**.

When the page refreshes, you will see that the new event has been added, both to the list on the right-hand side of the screen as well as blocked out in black on the calendar on the left-hand side of the screen.



**SCHOOLDUDE SAYS:** Keep in mind that when you define an event, you're only defining it for one year.

## Few More Things About the Calendar:

When you enter an event into the Organization Event Calendar, that event's date or dates will show as highlighted in black on the yearly event calendar on the left-hand side of the page.

Below is an example which shows that Spring Break is on April 17-21. Its dates have been highlighted in black on the calendar.

January							February							March						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7	8	9	10	11	12	13	14
8	9	10	11	12	13	14	5	6	7	8	9	10	11	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25	19	20	21	22	23	24	25
29	30	31					26	27	28					26	27	28	29	30	31	
April							May							June						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	8	1	2	3	4	5	6	1	2	3	4	5	6	7
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	
July							August							September						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7	1	2	3	4	5	6	7
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28	29	30
October							November							December						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7	1	2	3	4	5	6	7
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30

- To **delete** an Event entered onto the list and the calendar on the Organization Events Calendar page, simply find that item on the list and click the  on the right-hand side, next to the event you wish to delete (see next page).
- To **edit** an Event's information once it's been entered into the Organization Event Calendar, enter the Event again into the calendar, using the corrected information, and then delete the previously entered incorrect Event from the list.
- To show only "Shared" events, that is, events shared by all Locations, click on the **Show Only Shared Events link** (shown in red) next to the clasped hands icon  on the Organization Events Calendar page. This link is located above the list of events (see next page).

[View](#) | [Organization Event Calendar](#) | [Get Weather](#)

**Add New Event**

Begin Date   End Date   Event Title  
   -- Select Event Type --

Create for ALL Locations

County Schools Organization Event Calendar

 [Show Only Shared Events](#)

1 - 6 of total 6 listed [◀ Previous 20](#) [N](#)

4. The Get Weather shortcut, as with the weather icon on the main monthly calendar, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.



- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your **Zip Code** or **City/State** into the box shown above and click **Go**.

## VIII. Reports: Listing, Printing, and Graphing Your PM Schedules.

SchoolDude provides you with the options of listing, graphing, and printing any and all of your schedules, along with their information, for your convenience and for your records. And it's really easy! Using the Information and Analysis section of your **Home** page, follow the steps in this section and you'll have hard copies and visual aids for all of your preventive maintenance information at your fingertips.

These are the types of reports that are available in PMDirect:

- Budget Codes
- Classifications
- Crafts
- Employees
- Equipment
- Groups
- Locations
- Manufacturers
- PM Schedules
- PM Templates
- PM Work Orders
- Projects
- Project Parts and Supplies
- Types



**SCHOOLDUDE SAYS:** Remember, all reports in PMDirect provide you with an estimated cost based on the schedules created. To view actual costs, you'll need to go to the MaintenanceDirect reports.

- To get started with running a report, use the **Information Analysis** section of your **Home** page to help you find the information you need. Click on that category's [link](#). For our example, we'll use PM Schedules so we'll click on the PM Schedules link.

- You'll be taken to the My PM Schedules page, which looks something like this:

The screenshot shows the 'My PM Schedules' page. At the top, there's a navigation bar with 'Home', 'Calendar', 'New Schedule', and 'Account Settings'. Below that is a search bar and a 'GO' button. A 'PM Schedules Shortcuts' menu is open, showing 'Talk About It!', 'Suppliers', 'New PM Schedule', 'My PM Schedules' (which is highlighted with a blue arrow), 'Batch Reassess', 'Graph My Schedules', 'Print My Schedules' (highlighted with a green arrow), and 'Print Schedule Analysis' (highlighted with a yellow arrow). A legend says 'Click [ ] to sort table by that column.' Below the menu is a 'Filtering' section with a grid of letters (A-Z) and a 'All' button. The main area is titled 'My PM Schedules' and shows a table of 8 PM schedules. The table has columns for 'Title', 'Status', 'Craft', 'Classification', 'Est. Labor Hrs', 'Recurrence Pattern', and 'Total Est. Costs'. The first schedule is for 'Fire Alarms' on 12/18/2006. The last schedule is for 'Leaf Blower' on 12/31/2006. At the bottom are 'Print This!' and 'Print to Excel' buttons.

Once on this page, you have several options:

- To view the details of a PM schedule, click on that schedule's **title**, shown in red on the left-hand side of the screen (see red arrow above).
- To view a report, click on the **Print My Schedules** shortcut in the shortcuts menu at the top of the page (see green arrow above).
- To view a graph, click on the **Graph My Schedules** shortcut (see yellow arrow above).
- For a schedule analysis, click the **Print Schedule Analysis** shortcut at the top of the page (see blue arrow above).
- To print your information a different way, you can also look for the “**Print This!**” or **Print to Excel** icons near the bottom of the page. See below:



Click on the appropriate **icon** and follow the step-by-step instructions to specify exactly what you want to print and print your reports.



**SCHOOLDUDE SAYS:** Keep in mind that when printing, a summary report will only show totals, while a detailed report will display each event in the schedule.



**SCHOOLDUDE SAYS:** Adobe Acrobat Reader must be installed to view reports. All reports are displayed in PDF format.

# SchoolDude Vocabulary

(A Lesson in SchoolDude-ish for PMDirect Users)

So you've hit a certain word or phrase and you have no idea what you've just read? Welcome to SchoolDude Vocabulary, a glossary created especially for SchoolDude clients to make all that "SchoolDude lingo" a little less confusing. We've also included in this section a brief legend of the icons used throughout PMDirect.

**Budget Codes:** Designated funds coming from a specific budget that are applied to cover a particular work order's costs. If your organization doesn't use formalized budgets, you might still use arbitrary Budget Codes for tracking work expenses.

**Buildings:** If you have multiple free-standing structures on a campus, you might list these as Buildings for a particular location. Some examples are "Dude Hall", "Smith Performing Arts Center".

**Calendar Event Types:** The name or title of an event, used on the Calendar page to describe an event put on the calendar. An example of a Calendar Event Type would be "Spring Break" or "Teacher Work Day".

**Classifications:** A way of breaking down equipment by what it's used for. For instance, a classification could be "lawn equipment" or "HVAC".

**Closed:** The status a work order schedule would hold once all transactions and notes were added into it.

**Crafts:** Crafts are generic skills needed to fix a problem. MaintenanceDirect and PMDirect have over 200 crafts to choose from. Crafts help you organize your work and assign it to the appropriate people. Think of crafts as another way of saying "trade code" or "problem type".

**Deferred:** This status is used to show that a schedule has been created but will be activated at a later date.

**Equipment:** Any tools, machinery, etc. used to carry out work done, such as lawnmowers or generators.

**Locations:** Locations are typically campuses in your district. If you are working with a single campus, locations may be used for different places on that campus.

**Project Codes:** Project Codes can group several work order schedules into a common project. For instance, you may have several work orders that deal with building a new

playground set. Applying the same Project Code to each of the work orders allows you to run reports on how much that playground set cost to install.

**Quick Launch:** a section of shortcuts on the left-hand side of the **Home** page, used for such things as creating a PM schedule, printing PM work orders, and visiting the User Forum.

**Quick Links:** a drop-down box at the top of each page in PMDirect that allows you to switch from one SchoolDude product to another without logging out and then logging back in.

**Shortcuts:** Links that SchoolDude utilizes in all of its products so that users can navigate quickly from one page to another without clicking through a series of other links. These Shortcuts are usually located near the top of a page in a series of white boxes. Different shortcuts are available on differing pages and they also vary from role to role.

**Users:** Anyone employed by your district or educational facility that uses PMDirect.

## Symbol/Icon Legend:

: Indicates required information.

: Click on this calendar icon to be taken to an interactive calendar where you can select the date you wish to use.

: The thumbs-up and thumbs-down icons indicate that a service or service provider is active or inactive, respectively.

: Click on this email icon to open up a blank email form.

: Click on this icon to sort information by the category it indicates (the category that it appears beside).

: Clicking on this icon will invert listed options or information.

: This icon is used on the Organization Event Calendar page and indicates an event that is shared by more than one Location.



This is the SchoolDude. He's your friend.

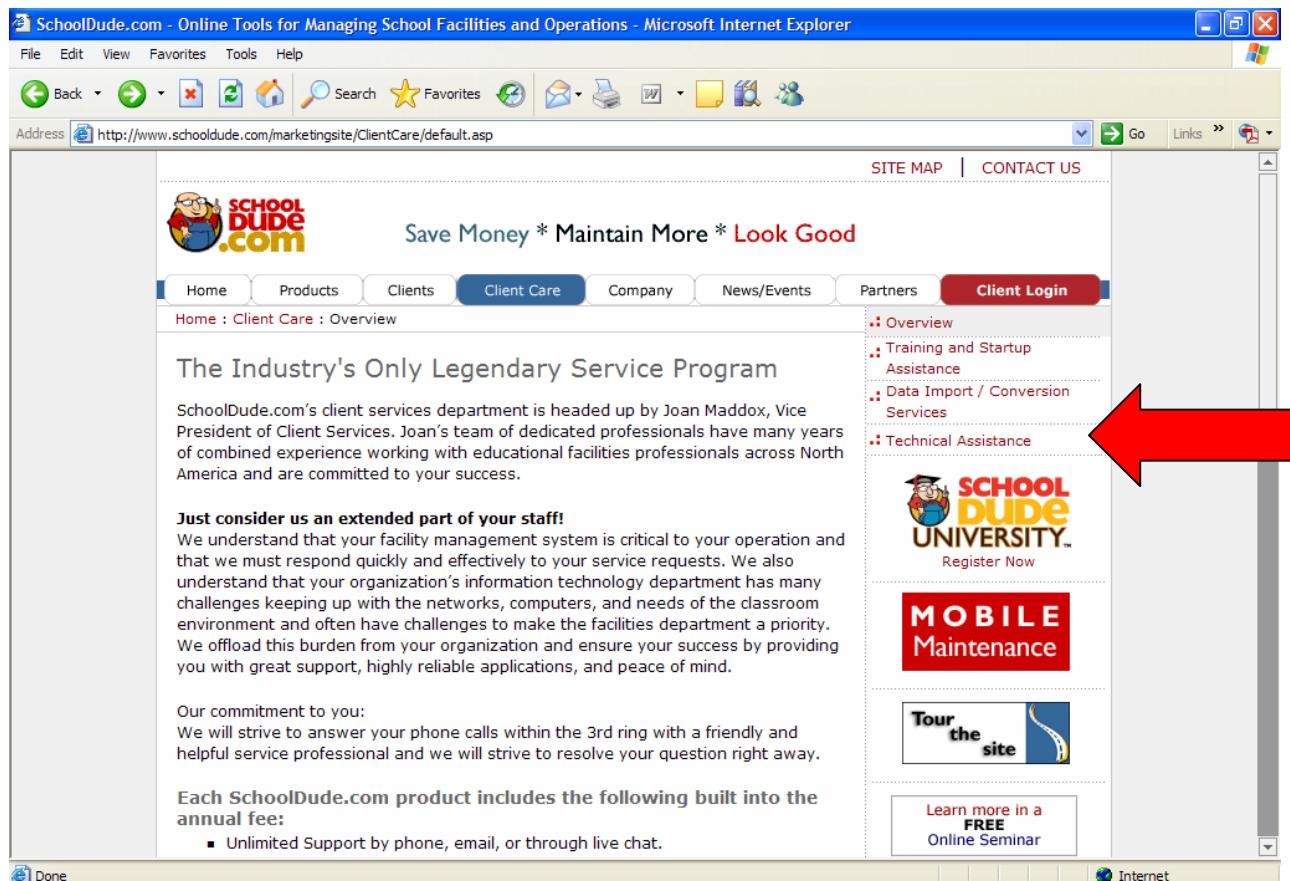
# Help Reference

At SchoolDude, we understand that sometimes searching for answers to your questions can be frustrating. For that reason, we've included this page to give you a few quick sources to get you off the shoulder and back onto the road.

1. Give us a call at 1-877-883-8337. We strive to answer your phone calls within the first three rings. Our friendly and helpful service professionals will be available to take your calls between the hours of 8 am and 6 pm (EST) Monday - Friday.
2. Drop us an email at the following address: [support@schooldude.com](mailto:support@schooldude.com). Someone will reply to your email or give you a call promptly, usually within an hour during regular business hours.
3. Chat live with a service professional by logging on to your account and clicking on the **Help** link in the lower right-hand corner of your Home page. It looks like this:

**Click [here](#) to talk to  
an Online Operator  
NOW!**

Or visit [www.schooldude.com](http://www.schooldude.com), click on **Client Care**, and choose **Technical Assistance** (shown in red) from the list on the right-hand side of the screen. See below:



SchoolDude.com - Online Tools for Managing School Facilities and Operations - Microsoft Internet Explorer

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Address: <http://www.schooldude.com/marketingsite/ClientCare/default.asp> Go Links

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Home : Client Care : Overview

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We understand that your facility management system is critical to your operation and that we must respond quickly and effectively to your service requests. We also understand that your organization's information technology department has many challenges keeping up with the networks, computers, and needs of the classroom environment and often have challenges to make the facilities department a priority. We offload this burden from your organization and ensure your success by providing you with great support, highly reliable applications, and peace of mind.

Our commitment to you:  
We will strive to answer your phone calls within the 3rd ring with a friendly and helpful service professional and we will strive to resolve your question right away.

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- Unlimited Support by phone, email, or through live chat.

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- Training and Startup Assistance
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